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## **JIMS - JOURNAL OF IDENTITY AND MIGRATION STUDIES**

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## **RESEARCH ARTICLES**



## **Nationalization Scheme (Nitaqat) in Saudi Arabia and the Condition of Filipino Migrant Workers**

*Henelito A. SEVILLA, Jr.*<sup>1</sup>

**Abstract.** *The Philippines is one of few countries in the developing world that heavily relied on exporting its laborers to sustain its economic growth. Despite attempts by previous administrations to minimize sending Filipino workers abroad by improving working condition at home so that working abroad would no longer be compulsory but optional, many Filipinos continue to leave the country hoping to alleviate their families from poverty. This idea of working abroad has several implications for migrant workers especially in regions where labor policies are not clearly laid down and that rights and welfare of migrant workers are not protected.*

*This paper seeks to elucidate the conditions of Overseas Filipinos Workers (OFWs) in Saudi Arabia which strictly implemented “Saudization”<sup>2</sup> policy since 2011. In particular, the paper tries to address the following questions: What does “Saudization” (nitaqat) mean from Filipinos’ perspectives?; Who are affected by this policy and Why have OFWs been affected by such policy?; How did undocumented or illegal OFWs survive in previous years?; What policies they have implemented to counter it?*

*This paper is centered on its main thesis that Saudi Nationalization policy, which is centered on solving socio-economic problems facing the young and unemployed population in several Gulf countries, has been the driver for these governments to strictly implement such a law and that many migrant workers including Filipinos working on specific areas together with undocumented ones are gravely affected.*

### **1. Why Saudization (nitaqat) Policy?**

The lifeblood that makes the economy of many countries in the Middle East and North African region (MENA) survive is the presence of crude oil that lies

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beneath its land surface. From the time the world economy became addicted to the use of oil, Arab economies particularly along the Gulf region have also transformed from being traditionally mining and fishing economies into wealthy oil producing economies.

The discovery of oil, though considered a blessing for many of them, has also produced longer negative implications to their economy, to their system of governance including their culture. Apart from this, crude oil puts the region into the limelight of a world geostrategic competition where rivalries, interests and political struggles over the control of the region as become the dominant discourses for more than a century now.

The geo-economic importance of crude oil in the region has also benefited many economies in the developing world such as countries in Africa and Asia, which sent millions of workers to the region to take advantage of the petro dollar bubble and earn better salaries than the amount they can get from their own countries. The world's biggest economies also actively participated in this development, having taken advantage of the opportunity to massively invest in the oil and services sectors. Such investments gave them the opportunity to control the movement of production and marketing of crude oil and its finished products at the international markets.

Whereas, major Arab-oil producing countries thought that improving accumulation of petro wealth will give them both economic and political leverage not just in the Middle East region but also in the international community. However, accumulating petro wealth enabled these countries to depend on services, food and industrial supplies from abroad. In addition, they also became so much dependent on foreign workers who provide them household, medical, managerial, and security services.

Their economic and political sectors are run by corporations and individuals mainly from the Western countries.<sup>3</sup> Their labor sectors are occupied by millions of expats from the developing world. Their security apparatus is run by hired foreign advisers, where arms and tanks are supplied mainly from big arms suppliers such as the USA, Europe and Russia. Their children's education is supplied by a western oriented educational system and their children are mostly cared for by expats maids such as the Filipinas.

While some Arab countries in the region have successfully carried out the transformation of their economies from being oil driven economies to investment

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<sup>3</sup> Anne Alexander, "The Crisis in the Middle East," *International Socialism Journal*, (Winter: 2003), <http://pubs.socialistreviewindex.org.uk/isj93/alexander.htm>.

and tourism driven economies like the United Arab Emirates (UAE), most other economies have remained traditional. In many cases, the massive amount of money these economies accumulated did not produce a sustainable economic change by boosting production capacities in the past years. Instead it encouraged overspending which contributed to the gradual diminishing rate of their sovereign funds. Critical to this, the money these economies paid to foreign workers was not used inside their countries but was transferred to the labor sending countries. The long run effect of this economic cycle is the draining on their treasuries.

Labor exporting countries, for more than four decades now, continue to send workers to Arab countries. They continue to reap the benefits of earning hard cash from the remittances of their workers abroad while the receiving Arab countries enjoy the services provided by expats yet in the detriment of their own labor force.

In the last decade, beginning the year 2000 up to the present, Arab oil producing countries like Saudi Arabia are beginning to notice socio-economic problems particularly among their young population who despite holding university degrees are unable to find work especially in the private sector. Recognizing these increasing socio-economic trends, many Arab countries adopted some economic reforms to address unemployment problem facing new university graduates. In spite of these reforms very little successes were achieved.

Nationalization in the labor market is one strategic economic policy adopted by Saudi Arabia. Although, the nationalization or the nitaqat policy has been approved some years ago, it was only recently that the Saudi government has strictly implemented it by gradually discouraging illegal or undocumented foreign workers to work in the Saudi labor market particularly the private business sectors, which accumulate a larger number of foreign workers in comparison to the local workers. Saudi government has offered incentives to local companies who employed Saudi nationals.

Such policy if strictly followed by Saudi companies could help address the problem of local unemployment but it would also have an impact on the quality of services or products it would produce and deliver once local workers take over. Apart from this, Saudi companies must be ready to give higher salaries to local workers relative to the expats minimum salary rate.<sup>4</sup> Of course a “hierarchy of foreign workers” is also practiced in the Kingdom wherein salary depends on the

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<sup>4</sup> Daymien Gayle, “Saudi Arabian Official Filmed Beating Foreign Workers with a belt as they visit passport office to get their visas,” *Miami Newsday*, May 29, 2013, <http://www.miaminewsday.com/national/8473-saudi-arabian-official-filmed-beating-foreign-workers-with-a-belt-as-they-visit-passport-office-to-get-their-visas.html>.

country of origin. Arab and Western workers occupy the highest salary bracket whereas; workers from Africa, Indian subcontinent and Southeast Asia received the lower salary scheme.<sup>5</sup>

In a country with about 7.5 million legal foreign workers<sup>6</sup>, the full implementation of this policy will require Saudi to carefully calculate its move since an immediate replacement of the expats labor market by local workers may create a crisis in the economy due to a lack of technical expertise that can offer the quality of services.

Private sector in Saudi Arabia alone employs around 6 million migrant workers while only over one million Saudis remain jobless. The Saudization was launched in June 11, 2011 after previous measures failed to achieve significant results. For many analysts, the nitaqat is the most radical form of nationalization and in a country where labor markets depend much on foreign workers, the nitaqat system may be difficult to achieve. In fact according to Saudi Labor Minister Adel Faqih, 90 percent of Saudi Arabia's private sector is populated by foreigners.<sup>7</sup>

In this policy, the Saudi government put private companies into four categories: excellent and green or blue for complying companies while yellow and red for non-complying companies. The red-coded companies had until September 11---to comply with Saudization requirements while yellow coded ones have until December 11--- to comply. Yellow coded companies that fail to comply with the government's requirements will immediately be denied renewal of work visas for foreign workers beyond six years. Meanwhile, red coded companies who do not meet the government's requirements, will be unable to renew the work visas of foreign workers.<sup>8</sup> According to analysts Safi Jannaty, the new policy which imposes a fee or penalty on private companies employing more foreign workers might not be very effective in addressing the issue of unemployment of Saudi nationals since private companies are inclined to pay the higher fee or penalty as they still would

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<sup>5</sup> Ibid.

<sup>6</sup> "New Plans to Nab Illegal Reveals", Arab News, April 16, 2013, <http://www.arabnews.com/news/448234>.

<sup>7</sup> Bea Cupen, Saudi labor ministry: 'Saudization' policy a failure. December 10, 2011. <http://www.gmanetwork.com/news/story/241292/pinoyabroad/saudi-labor-ministry-saudization-policy-a-failure>

<sup>8</sup> Ibid

still be saving substantial sums.<sup>9</sup> As of January 8, 2013, the nitaqat system has so far been able to employ 400,000 Saudi citizens.<sup>10</sup>

## ***2. Migrant Workers and Saudization (Nitaqat) Policy: Sectors in Economy Affected***

There have been discussions in the Philippines on the possible impact of nationalization of Saudi Arabia labor market on Philippine economy. Given the strategic contribution of overseas Filipino workers, Saudi nationalization will force the Philippine government to create alternative sources of income for thousands of Filipinos affected by this policy.

Three outcomes, may be mentioned with the implementation of this policy: **First** is that nitaqat would possibly lead to repatriation of thousands of Filipinos illegally working in the Kingdom; **second**, is the loss of thousands of jobs for these repatriated Filipinos and; **third**, is the decrease in remittances of Filipinos to the Philippines. As the results of this, many families who depend from money abroad will be affected and in return the country's economy will also be affected.

There are currently about one and half million (1.5) Filipino workers (OFWs) in the Kingdom. Saudi Arabia is the highest recruiting country from the overall two million Filipino workers in the Middle East and North African (MENA) region. Saudi's dependence to foreign workers and its familiarity with Filipino service quality in healthcare, education, oil industry and house hold services are undeniable. However given that oil revenue will not last in the future and therefore the country can no longer afford to provide an absolute financial support to its citizenry; Saudi would need a strategic policy if it want to achieve sustainable stability in the future.

The traditional practice of a welfare system by subsidizing almost all aspects of Saudis' economic needs would jeopardize the country's future economic sustainability. Money that Saudi has generated from crude oil is spent for public services, while the youth are not well prepared to do the tasks normally done by foreign workers. In addition to this, salaries given to foreign workers are not spent inside the country but are sent to the expats home countries such as Yemen, India, Pakistan and the Philippines. Thus, the long but dangerous implications would be the gradual draining of the Saudi economy. Such condition may not be felt by many Saudis right now but the implementation of nitaqat suggests that the government is

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<sup>9</sup> Safi H. Jannaty, *Dammam*. Saudization program. November 16, 2012. Arab News. <http://arabnews.com/saudization-program>.

<sup>10</sup> Fakeih: No going back on Saudization. <http://www.arabnews.com/fakeih-no-going-back-saudization>.

aware of the possible implications of these practices to the country's economic sustainability.

With this in mind, there is no doubt that the policy leaves labor sending countries to worry about the job security of their own people including the possible immediate impact on the value of foreign remittances which invariably help keep their economies afloat. The strict and immediate implementation of this policy may create fear among Filipino workers in Saudi Arabia and may force the Philippine government to look for alternative markets for Filipino workers. The implementation of nitaqat means that at least 10 percent of the labor force of all construction companies and a minimum of 70 percent of the staff headcount of about 300,000 firms in the Kingdom of Saudi Arabia<sup>11</sup> will be taken over by Saudi workers, replacing foreign workers including the Filipinos. Once that would happen, an expected negative impact on about \$1.5 billion remittances from the OFWs from Saudi Arabia will be felt. Aside from this, it is expected that an estimated number of 150,000 from the 1.5 million OFWs in Saudi Arabia could possibly be displaced.<sup>12</sup> Such number of OFWs is bigger than the number of OFWs being repatriated from Libya, Syria, Egypt, Yemen and other MENA countries due to political turmoil.<sup>13</sup>

Many of these Filipinos are either undocumented or have opted to stay in the Kingdom after they have finished their contract to look for possible new employers. Others have switched to new jobs without transferring their residency papers while thousands more were abandoned by their original sponsors.<sup>14</sup> Sponsors are required to provide a permission of no objection to Filipino workers before they can get an exit visa. The other remaining Filipino workers are working for private or small companies that do not simply comply with the government policies on nitaqat.<sup>15</sup> Dispute between the employees and their original employers will be settled in the labor court, whereas household service workers (HSW) who left their

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<sup>11</sup> How Saudization will affect the Philippines. Manila Times. 09 August 2011. <http://www.manilatimes.net/index.php/opinion/4024-how-saudization-will-affect-the-philippines>.

<sup>12</sup> Ibid.

<sup>13</sup> Jerome Aning. Labor chief allays OFWs' fears of 'Saudization'. June 30th, 2011. Philippine Daily Inquirer. <http://globalnation.inquirer.net/5072/labor-chief-allays-ofws-e2%80%99-fears-of-e2%80%98saudization-e2%80%99#ixzz2RvQPY6EO>.

<sup>14</sup> Illegal OFWs in Saudi Arabia breathe easier as king suspends crackdown. April 7, 2013. GMS News Online. <http://www.gmanetwork.com/news/story/302800/pinoyabroad/news/illegal-ofws-in-saudi-arabia-breathe-easier-as-king-suspends-crackdown>.

<sup>15</sup> Mayen Haymalim, and Jose Rodel Clapano, "Illegal OFWs can Correct Status, go back to Saudi," *The Philippine Star*, July 12, 2013, <http://www.philstar.com/metro/2013/07/12/964471/illegal-ofws-can-correct-status-go-back-saudi>

employer may either return back to their old employers or find a new one. Filipino employees can also transfer to private companies as a skilled worker.<sup>16</sup>

The Saudi Kingdom had given a three month-delay on the crack down on migrant workers. On March 28, 2013, it had started crack down operations which has resulted to a massive camping of Filipino undocumented workers outside the Philippine Consulate office in Jeddah and are calling the Philippine government for a mass repatriation in spite of the kingdom's announcement of additional three months reprieve on crackdown against illegal workers.<sup>17</sup> The Philippine Embassy in Saudi together with other concerned Filipino workers is using social media to disseminate information to other Filipinos. Many OFWs are also employed in other jobs apart from the original job they have in their original contract.

Saudi labor law prohibits employers to allow employees to work for other employers. Should there be a violation to this, both employees and employers will be fined accordingly.

Article 39 of the Saudi Labor Law states that

"It is not allowed for an employer to let his (foreign) worker go out and work for others. It is also not allowed for a worker to engage in work for another employer. The employer is not allowed to employ workers who are under the sponsorship of others. The Ministry of Labor shall inspect the firms and investigate the violations discovered by its inspectors, and then forward them to the Ministry of Interior to take penal actions against them".

"The employer is not allowed to let his worker engage in work for his own benefit. The worker would also not be permitted to work on his own account. The Ministry of Interior shall arrest, deport and take punitive measures against these violators who are working for their own benefit in the streets and public squares as well as against those who run away (from their sponsors)."<sup>18</sup>

The practice of sponsorship in Saudi Arabia has made sponsors very rich yet it created a chaotic situation in Saudi labor market. Sponsors bring in foreign workers yet these workers do not necessarily for them. Workers are sold to other employers to work and in return the workers would pay the sponsor a fixed amount at the end of every month. Such transactions have made these sponsors or "kafeels"

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<sup>16</sup> Ibid.

<sup>17</sup> Andrea Medina, "From Nitaqat to Tent City: A Look into the Saudi crackdown on Illegal workers." *GMA News Online*, April 18, 2013, accessed July 18, 2013, <http://www.gmanetwork.com/news/story/304500/pinoyabroad/news/from-nitaqat-to-tent-city-a-look-into-the-saudi-crackdown-on-illegal-workers>.

<sup>18</sup> "Saudi Crackdown on Illegal Workers worries OFWs", ABS-CBN News, April 4, 2013, <http://www.abs-cbnnews.com/global-filipino/04/03/13/saudi-crackdown-illegal-workers-worries-ofws>.

become rich while workers' welfare and security are jeopardized. Such practice is a violation of the Saudi labor law and the Residence Law. Aware of the existing 'black visa market' the Saudi authorities have initiated massive campaign against violators. Due to worries from government nitaqat campaign, sponsors have stopped operating and therefore left expat workers to lose their opportunity to work. Once known by the authorities, such expat workers may be transferred to other sponsors without prior consent from the original sponsor and expat workers may be asked not to pay the original sponsor. Moreover, in cases where the sponsors are individuals and not a company or entity, then nitaqat would not be applied to them even if they have house hold helpers, hence the Ministry of Labor may not be able to force the sponsors to transfer the sponsorship to other individual or entity.<sup>19</sup>

Recognizing the complexity of the problem metioned above, the Philippine government through its leading agencies has been convincing the OFWs in Saudi to immediately process their working status to make sure that they would pass the requirements to legally work in the country. At the same time the Philippine embassy in the Kingdom urged Filipino workers who have been wrongfully terminated to seek assistance from the Philippine Overseas Labor Office (POLO) in Riyadh, Jeddah and al-Khobar<sup>20</sup> to file necessary complains with the Saudi Labor Office.

The Commission on Filipino Overseas Filipinos indicates that in 2011, there were around 20,000 undocumented Filipinos in Saudi Arabia. The 2012 report of the Philippine Overseas Labor Office (POLO) and the Overseas Workers' Welfare Administration (OWWA) indicated that there were around 20,000 undocumented workers in Riyadh, 10,000 in Jeddah and in the Western region, 300 in Eastern region and 100 in Central regions. Once they are caught that they have not complied with the requirements or they are undocumented the Saudi government will impose penalty on them ranging from 1,000 to 50,000 riyals or an equivalent of P11,002 to 550,105 Philippine pesos.<sup>21</sup> Given this situation, non-correction of working status by OFWs may lead to more problematic results.

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<sup>19</sup> Qaisar H. Matawea, "Do not allow sponsors to Exploit their Employees," *Arab News*, May 20, 2013, <http://arabnews.com/news/452221>.

<sup>20</sup> "Philippine Embassy: 'Nitaqat' Termination Appealable," *Sun Star*, July 17, 2011, accessed July 17, 2013, <http://www.sunstar.com.ph/manila/local-news/2011/07/17/philippine-embassy-nitaqat-termination-appealable-167370>.

<sup>21</sup> Andrei Medina. From Nitaqat to Tent City: A look into the Saudi crackdown on illegal workers. April 18, 2013. GMA News Online. <http://www.gmanetwork.com/news/story/304500/pinoyabroad/news/from-nitaqat-to-tent-city-a-look-into-the-saudi-crackdown-on-illegal-workers>.

### **3. Philippine Migrant Policies: Unilateral, Bilateral and Multilateral Approaches**

There had been many incidents relating to the security of Overseas Filipino Workers (OFWs) abroad in the past. Managing and solving problems of OFWs may require not only a unilateral action from the Philippine government through its responsible agencies but also through bilateral and multilateral efforts. Despite contingency plans and other mechanisms adopted unilaterally by the government to protect and repatriate OFWs in times of conflict in a politically unstable country, bilateral and multilateral levels of engagement would still be preferred and deliver best results. This means that in a situation where safety of Filipino workers is jeopardized in a third country, the Philippine government may most of the time feel unable to help if there is no corresponding assistance or coordination from other agencies or government of the third country. Philippine government's ability to influence the events in other countries to protect her nationals is restrained by the very essence of non-intervention and respect of the domestic policies and laws of the receiving country. Thus, in an event where Filipino workers are involved in drug cases or crimes in a third country, the Philippine government could only deliver an appeal but it is handicapped to influence the decision. This situation is very important because in the Philippines, many Filipinos do not seem to understand the limitation of their government to do something for them in another country.<sup>22</sup>

The cases of Filipino drug mules in China, and the cases of many Filipinos in various jails in Middle East countries due to crimes such as murder, drug cases, overstaying, breach of contract, etc., are indicative of a persistent need to alleviate the living status of millions of Filipinos without decent source of incomes. Much work has to be done to address this economic disease.

It becomes clear to many Filipinos and foreign observers that exporting Filipino skilled workers abroad has become a necessity rather than a choice at least up to the present despite of many official announcements that the government is working to alleviate the economy and provide more jobs to Filipinos so that going abroad would no longer be a necessity.

Exporting Filipino labor has become a national and transnational business by which not only the Philippine government is involved but also other entities and countries have participated. Given this situation, the transnational trends of labor export and migration requires a multiplicity of mechanisms to safeguard the lives and protect the welfare of every Overseas Filipino Workers (OFWs). However, since the government has the supreme authority to make policies and enter into

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<sup>22</sup> See cases of Filipinos in China being tried in Chinese courts due to drug crimes.

agreements with other entities relating to Filipino workers, it is but prudent that it must exert all efforts to make sure that her citizens abroad are protected.

In relation the protection of OFWs, the Philippine government has come up with multitude strategies to protect the dignity and lives of OFWs. Several programs were implemented and the government has entered into bilateral and multilateral agreements.

The Migrant Workers and Overseas Filipino Act of 1995 or otherwise known as Republic Act No. 8042 institutes various policies relating to overseas employment which sets a higher degree of standardized protection of the welfare of migrant workers together with their immediate families especially in times of crisis.<sup>23</sup> Republic Act 10022 or the so called Amended Migrant Workers' Act also helps to “intensify protection for Overseas Filipino Workers (OFWs), as they will be employed in the countries where the rights and welfare of migrant workers are protected.”<sup>24</sup> Under this Amended Migrant Workers Act, the Department of Foreign Affairs through their embassies abroad are directed to make a survey to find out if there are existing laws that protect migrant workers in those countries. There are criteria for the said survey and this include the following: (1) if the receiving country has existing labor and social laws protecting the rights of migrant workers; (2) if the receiving country is a signatory to and/or ratifier of multilateral conventions, declarations or resolutions relating to the protection of migrant workers; (3) if the country has concluded a bilateral agreement or arrangement on the protection of the rights of overseas Filipino workers and; (4) the receiving country is taking positive and concrete measures to implement the first three criteria.<sup>25</sup>

To strengthen its resolve the Philippine Overseas Employment Administration (POEA) conducts pre-departure seminars to prospective migrant workers through the Philippine Labor Market Information and Training Programs which includes: Pre-employment Orientation Seminar; National Manpower Registry to identify available jobs and skills in the labor markets; Pre-departure

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<sup>23</sup> Migrant Workers and Overseas Filipino Act of 1995 (Republic Act No. 8042), Philippine Overseas Employment Administration (POEA), accessed July 19, 2013, <http://www.poea.gov.ph/rules/ra8042.html>.

<sup>24</sup> Amended Migrant Workers Act to intensify Protection of OFWs, Philippine Official Gazette, updated November 26, 2010, accessed July 19, 2013, <http://www.gov.ph/2010/10/05/amended-migrant-workers-act-to-intensify-protection-of-ofws/>.

<sup>25</sup> Amended Migrant Workers Act to intensify Protection of OFWs, Philippine Official Gazette, updated November 26, 2010, accessed July 19, 2013, [http://www.gov.ph/2010/10/05/amended-migrant-workers-act-to-intensify-protection-of-ofws.](http://www.gov.ph/2010/10/05/amended-migrant-workers-act-to-intensify-protection-of-ofws/)

Orientation Seminar; Technical Training for Filipino Workers; Skills Testing and Certification.<sup>26</sup>

In addition to this, the Philippine government has also entered into bilateral agreements with the Kingdom of Saudi Arabia to make sure that its almost 1.5 million workers are duly protected. The recent signed *Standard Employment Contract* by the Philippine Secretary of Department of Labor and Employment (DOLE) Rosalinda D. Baldoz and Deputy Labor Minister Mufreh Al-Haqabani of the Kingdom of Saudi Arabia, manifest the continued bilateral cooperation between the two countries. The contract is a historic move between two countries and “recognizes among others, the SR1,500 minimum entry-level salary, weekly rest days and daily rest periods, paid vacation leave, non-withholding of passports and work permits, free communication, and humane treatment” for Filipino Overseas Workers working in the Kingdom. It can be recalled that in June 2011, the Philippines and Saudi had both voted for the adoption of the International Labor Organization (ILO) Convention 189 concerning decent work for domestic helpers.<sup>27</sup>

Recently the Philippines is the second country next to Uruguay that ratified 35 International Labor Conventions into which 33 of them are enforced.<sup>28</sup> “Under the Convention, each ILO member-state shall take measures set out in the Convention to ensure the effective promotion and protection of the human rights of all domestic workers and to respect, promote and realize the fundamental principles and rights at work of domestic workers, namely: freedom of association and the effective recognition of the right to collective bargaining; the elimination of all forms of forced or compulsory labor; the effective abolition of child labor; and elimination of discrimination in respect of employment and occupation.<sup>29</sup> The

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<sup>26</sup> Liberty T. Casco, Deputy Administrator, Philippine Overseas Employment Administration (POEA) “The Role of Pre-departure Information and Training Programs for Migrants” Power Point Presentation, presented at International Organization for Migration, European Commission in Brussels Belgium, November 6, 2012, accessed July 19, 2013, [www.labourmigration.eu/events/document/160?format=raw](http://www.labourmigration.eu/events/document/160?format=raw)

<sup>27</sup> “Philippine and Saudi Arabia sign Labor Deals,” UCA News, May 20, 2013, accessed July 19, 2013, <http://www.ucanews.com/news/philippines-and-saudi-arabia-sign-labor-deal/68301>

<sup>28</sup> Report from ILO, generated by APPLIS July 19, 2013. Accessed July 19, 2013, <http://webfusion.ilo.org/public/applis/appl-byCtry.cfm?lang=EN&CTYCHOICE=0840&hdroff=1>

<sup>29</sup> “Aquino Ratifies Labor Conventions for Domestic Workers,” June 2, 2012, Sun Star, accessed July 19, 2013, <http://www.sunstar.com.ph/manila/local-news/2012/06/02/aquino-ratifies-labor-convention-domestic-workers-224796>.

ratification has gained approval from the global alliance of Overseas Filipinos Migrante International.<sup>30</sup>

#### **4. Philippine Response to Saudization (Nitaqat)**

The Philippine government should have been in a better position to assess the impact of the Nitaqat on the hiring and repatriation of the Filipino workers in Saudi Arabia. In fact the closure of ten (10) foreign posts in other countries by the DFA and DBM as part of the austerity measure of the Aquino administration had led to an assumption that more resources could be channeled to Philippine missions in Middle East given the density of Filipino workers there compared to other countries and regions in the world. Although, some analysts would disagree on the nitaqat's direct negative impact on the Philippine economy, such condition has been downgraded by the POEA saying that the policy would be implemented in a 'gradual and calibrated' manner.<sup>31</sup> This assumption proved true when the Kingdom of Saudi Arabia has given for the second time a four month extension to foreign workers to correct their working permits. In fact, many have been granted working permits. Despite this, the government has received report of cases of Filipinos who went on vacation but are being denied re-entry into the Kingdom.<sup>32</sup> In view of this, the government has asked Filipino workers to visit Philippine missions near their areas so that they would be assessed properly. In addition to this the Philippine Vice President and Presidential Adviser on Overseas Filipino Worker (OFW) Jejomar C. Binay has for many times reminded the OFWs in Saudi Arabia to process their paper as soon as possible to legalize their stay in this country, amidst reports that after the Kingdom has announced an extension Filipino expatriate "no longer feel the urgency to correct their status."<sup>33</sup>

As of this time of writing, the Philippine government has not yet been able to come up a specific course of action when it comes to Saudization. This was affirmed by Eric Endaya, Department of Foreign Affairs (DFA) executive director by inviting civil society groups or non-governmental organizations to submit a

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<sup>30</sup> "Migrante welcomes Aquino's signing of ILO Convention on Domestic Work." June 1, 2012, <http://migranteinternational.org/?p=2390>.

<sup>31</sup> Bea Cupen, Saudi labor ministry: 'Saudization' policy a failure. December 10, 2011. <http://www.gmanetwork.com/news/story/241292/pinoyabroad/saudi-labor-ministry-saudization-policy-a-failure>

<sup>32</sup> ANC and Willard Cheng, ABS-CBN News. PH seeks clarification of Saudization policy. 07/11/2011. <http://www.abs-cbnnews.com/global-filipino/07/11/11/ph-seeks-clarification-saudization-policy>

<sup>33</sup> "OFWs in Saudi Told to Process Papers, Told to Avoid Rush," Philippine Information Agency, July 12, 2013, <http://www.pia.gov.ph/news/index.php?article=241373610822>.

position paper on the Saudization to DFA, Malacañang, and Congress and even to Labor Department. Endaya added that such proposal will “pave the way for the government to really start creating policies.”

For sure now, three possible alternative solutions can be cited to solve the problem of OFWs in Saudi Arabia. These however are short range solutions to the problem at hand. **One** would be that the government must double its effort to push Filipinos to change their working status from being undocumented to documented so that they can enjoy protection while living and working in the Kingdom. In relation to this, OFWs with questionable status must also be vigilant enough to know whether the company that employs them has met the requirements set forth by the Kingdom. They have to find out if the company that employs them belong to a Blue (excellent) or Green color and not in Yellow or in Red colors.<sup>34</sup> Yellow listed companies are given a period of nine months as of June 11 to improve their rate of nationalization before restrictions come into effect, while Red firms are given six months.<sup>35</sup> Since many affected Filipinos may come from private sectors in Saudi labor force, it will be proper then that Philippine post in that country should assist these Filipinos in providing proper information on how to change their status. Filipinos may also visit government website <http://www.mol.gov.sa/announces.aspx> to visit their companies' status. Information is provided in both English, Malaysian, Indian, Tagalog, Bengali, Indonesian, Urdo and Turkish languages.<sup>36</sup>

**Secondly**, the Philippine government through its responsible agencies may consider finding an alternative labor markets for repatriated Filipinos from Saudi such as to Guam, Australia and Canada.<sup>37</sup> The issue regarding this option is whether skills required in alternative markets match the skills of repatriated OFWs from Saudi Arabia. In cases where skill mismatch would occur, the Philippines has

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<sup>34</sup> Companies deemed Excellent or Green would be granted the most privileges in visa requests and operations for non-Saudis. Yellow listed companies are given a period of nine months as of June 11 to improve their rate of nationalization before restrictions come into effect, while Red firms are given six months. In the restrictions, Yellow listed companies will find themselves barred from transferring visas of non-Saudi workers to their sponsorship, while Red companies will be barred from new visas, substitute visas and seasonal work visas, and from opening new branches or facilities with the Labor Office. “New Saudization Program,” Saudi Gazette, November 27, 2011, <http://ofwempowerment.com/ofw-guide/new-saudization-program/>.

<sup>35</sup> Ibid.

<sup>36</sup> “additional Facilitations and Exemptions for Corrections of Violations of Residence and labor laws,” <http://www.mol.gov.sa/>.

<sup>37</sup> POEA: Saudization will be Implemented Gradually, No Impact Yet on OFws,” July 15, 2012. OFW Online, [http://www.ofwguide.com/article\\_item-1566/POEA--Saudization-Will-Be-Implemented-Gradually--No-Impact-Yet-on-OFWs.html#ixzz2ZZFOawfH](http://www.ofwguide.com/article_item-1566/POEA--Saudization-Will-Be-Implemented-Gradually--No-Impact-Yet-on-OFWs.html#ixzz2ZZFOawfH).

standing training centers to train and honed OFWs to meet the criteria set forth by the new alternative markets. Although such option would not guarantee for an immediate employment, it would however prepare OFWs to acquire skills per requested by the alternative labor markets abroad.

**Third option** would be through gradual repatriation of OFWs. There are about 120, 000 OFWs directly affected by the Saudization apart from the 28,000 undocumented OFWs.<sup>38</sup> Out from this number 10, 000 to 12,000 have sought repatriation help from the Philippine Embassy in the Kingdom while others are still trying to legalize their status by transferring to another sponsor.<sup>39</sup> However, repatriation is not just happening in Saudi Arabia. Other neighboring countries in the region have also records of OFWs repatriation. These cases of repatriation in some Middle Eastern countries have added an additional burden to the Philippine government budget spending apart from the recent repatriation efforts in Libya and Syria. It can be recalled that in 2011, Vice President Binay had asked the released of almost P24 million from the President’s Social Fund to buy tickets for 1,084 OFWs staying at the Hajj Terminal in Jeddah. Binay also noted that the government was also paying 15 riyals daily for every Filipino housed at the Hajj Terminal, creates a “serious drain” on the “limited resources” of the Philippine embassy in Saudi.<sup>40</sup> This amount will be almost ten to eleven times if expenses of 12,000 OFWs who sought for repatriation will be shouldered by the government. In addition to this, the government would still spend money for its reintegration program for repatriated OFWs. The Philippine government has set aside around P50 million in the proposed budget of 2012 to support the reintegration of returning OFWs through livelihood programs. This is on top of governments P2 billion reintegration fund, recently launched in partnership with the Land bank of the Philippines and the Development Banks of the Philippines, to provide OFWs sustainable business opportunities.<sup>41</sup>

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<sup>38</sup> “P’Noy Government urged to Prepare for OFWs Reverse Migration Phenomenon, “ Press Release, Before its News, June 11, 2013, <http://beforeitsnews.com/middle-east/2013/06/pnoy-govt-urged-to-prepare-for-ofws-reverse-migration-phenomenon-2452112.html>.

<sup>39</sup> Ibid.

<sup>40</sup> Mike Frialde, “Binay Asked for P24 million Repatriation Budget for Saudi OFWs,” PhilStar, April 18, 2012, <http://www.philstar.com/headlines/677233/binay-asks-p24-million-repatriation-budget-saudi-ofws>.

<sup>41</sup> How Saudization will affect the Philippines . Manila Times. 09 August 2011. <http://www.manilatimes.net/index.php/opinion/4024-how-saudization-will-affect-the-philippines>.

In addition to budget problem, the government finds it difficult to repatriate some OFWs in Saudi given that they would have to obtain exit visa from their original employers. Sometimes these employers are hard to find,<sup>42</sup> given that many of these Filipino workers have either lost contact from their original employers or have escaped from their abusive employers; Obtaining exit visa for these Filipino workers is difficult.

In relations to financial and technical constrains cited above, new issue arising from “sex for repatriation” activities involving high ranking labor officials have also been dealt with seriously by the government. The allegations involving Filipino labor officials in Saudi Arabia “demanding sex” from OFWs in “exchange for plane tickets to Manila.” DFA Secretary del Rosario, in response to this allegations, formed a ‘fact-finding body’ to investigate the scandals and has called home the Philippine ambassadors to Saudi Arabia, Qatar, Oman, the United Arab Emirates, Bahrain, Egypt, Libya and Lebanon for consultations.<sup>43</sup> Moreover, the DFA has also expanded investigation to include Singapore, Malaysia, and Hong Kong which also run shelters for distressed Filipino Migrant workers.<sup>44</sup> In line with the “sex for repatriation” scandal, it is but an urgent call to the responsible Philippine agencies (DFA, PEOA, DOLE) to start cleaning up their agencies if they want to see a successful implementation of migrant policies and protection of the rights and welfare of OFWs in distress areas such as in Middle East region. For as long as greedy labor officials continue to man the shelter centers abroad, abuses continue to be expected especially to women. The replacements of those who were allegedly involved in scandal by women officers may perhaps help in minimizing abuses to women but it should not be taken as the final and concrete solution to the problem.

What is needed are diplomats, and labor officers who are disciplined, honest and committed to the programs of the government to achieve the maximum level of protection for Filipino workers abroad.

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<sup>42</sup> Maria Aleta Nieva Nishimori, “Money is not an Issue in Repatriating Stranded OFWs,” ABS-CBN News, April 30, 2013, <http://www.abs-cbnnews.com/global-filipino/04/30/13/money-not-issue-repatriating-stranded-ofws>.

<sup>43</sup> Tarra Quismundo and Jerome Aning. Filipinas in Saudi Arabia complain of sexual abuse. *Philippine Daily Inquirer*. 23-06-2013. <http://www.asianewsnet.net/Filipinas-in-Saudi-Arabia-complain-of-sexual-abuse-48286.htm>

<sup>44</sup> Esther Tanquintic-Misa. Three Filipinas Confirm Sex for Repatriation in Riyadh, Saudi Arabia, Philippine Foreign Affairs Ofc Widen Scope of Investigation to Southeast Asia and Hong Kong. June 25, 2013. <http://au.ibtimes.com/articles/482694/20130625/filipinas-sex-riyadh-saudi-arabia-philippines-investigation.htm#.Uc1E7NjMvIW>.

## 5. Conclusion

Nationalization program being implemented in various countries in (Persian) Gulf has been seen by many observers in the Arab world as the most efficient tool in solving the unemployment problem confronting the Arab youth sector. Decades of foreign labor dependency has produced not only a socio-economic crisis but also a political difficulty for the Persian Gulf de facto regimes once they would continue to deny them. The increasing rate of unemployed Arab youth in many of these countries including Saudi Arabia can be compared to a ticking time bomb ready to explode to challenge the legitimacy of the status quo.

The Arab uprisings in various countries in the Middle East region have indicated the socio-economic and political deficits many of these societies are facing and hence, governments must address peoples' demands for economic and political reforms if they want to stay in power.

Saudi Arabia's nationalization or nitaqat policy, may contribute to the efficiency of the Kingdom's economy by employing many of its unemployed youth in private sectors. It may also lead to a reform in Saudi's labor market to minimize illegal expat workers; and may discourage illegal recruiting activities by its own nationals or by any other recruiting entities operating in the Kingdom. However, the nitaqat policy has also created fears among those affected expats working in the Kingdom. Aside from this, it may also decrease the amount of remittances to labor sending countries.

Like India, Pakistan and other labor sending countries in Africa and Southeast Asia, the Philippines has also hugely depended from the remittances of its Filipino Overseas Workers (OFWs) to keep its economy afloat. The implementation of the nitaqat policy by the Kingdom of Saudi Arabia which employs about 1.5 million OFWs is something that must be taken seriously by the Philippine government. Although the Philippine government "accords high priority to the protection of Overseas Filipino Workers in the Middle East and North African countries,"<sup>45</sup> it should not be complacent to the current performance of temporarily solving the problems being faced by thousands of OFWs in Saudi Arabia who are due for repatriation.

Despite the economic benefits from the country's four decades of labor exports, the Philippines previous administrations had not been able to transform

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<sup>45</sup> Henelito A. Sevilla, Jr., "The Emergency Evacuation of Overseas Filipino Workers (OFWs) from Libya and Syria," Middle East Institute, February 9, 2013, accessed, July 19, 2013, <http://www.mei.edu/content/emergency-evacuation-overseas-filipino-workers-ofws-libya-and-syria>

these benefits into a sustainable socio-economic investment for the country in which working abroad is no longer a choice but an option.

The nitaqat policy being implemented in Saudi Arabia provides a warning to labor sending countries like the Philippines that their national policy of sending workers abroad to ease employment problem at home could not be sustainable in the long run and that the Philippine government should exert all efforts to create a productive working environment at home.

In doing this, the government will be facing crucial multiple tasks on how to achieve great gains from ideal great economic policies it has been adopting and implementing while at the same time teaching and encouraging Filipinos to save and contribute in building up the Philippine economy rather than just being consumers. Moreover, although it is the primary responsibility of the government to protect and provide basic services to the Filipino people, the Filipino people themselves must also share this responsibility and assess the government in its genuine programs instead of just relying everything and blaming the government of every failure that may affect the entire Philippine society.

For the government to realize its highly ambitious program to transform the idea of migrating abroad for work as a choice and not as a necessity, it has to do something to change the attitude of the people on how to save and invest for the future and not just being subject to a current practice of one day millionaire spending. It will be time for the Philippine government to engage with private sectors to establish a viable environment for small businesses.



## Loneliness and Depression among Wives of Pakistani Expatriate Husbands

*Najam-us-SAHAR & Nida Irshad GILLANI*

**Abstract.** *The present study was designed to assess loneliness and depression among wives of expatriated husbands with focus on the role of family. The sample comprised of 50 married women divided in two groups (29 living in joint family & 21 living in nuclear family setup) whose husbands are living abroad for last one year or more. Differential Loneliness Scale (DLS) & Beck Depression Inventory (BDI) were administered. Statistical analysis revealed that n=16(32%) of the participants experience severe depression. Furthermore a significant positive relation was found between loneliness & depression especially in intimate relations domain( $r=.66^{**}$ ). Another significant finding is difference in loneliness & depression based on family system. Women living in joint family system experienced more loneliness ( $M+SD= 29.1+11.9$ ,  $t=2.1^*$ ) and severe depression (35%) as compared to those living in nuclear family system ( $M+SD= 21.8+12.5$  for loneliness, 29% for severe depression. This study will be helpful in analyzing the psychological impact of husband's expatriation on their wives mental health and it will also serve as a representative and expressive effort to open new avenues for further researchers to consider social variables including family dynamics.*

**Key Words:** *Depression in women, Joint family system, women health in Pakistan, Pakistani expatriates, Differential Loneliness Scale*

### Introduction

Over the past few years technological advancement has changed the structure of society all over the globe. World now considered as global village has increased interaction among individuals coming from different ethnic groups and countries; living together for employment reason or migration. This expansion has influenced the social structure and family dynamics throughout the world. Developing countries like Pakistan have experienced migration of skilled labors to developed countries which is referred as expatriation. It has been estimated that over 4 million Pakistani migrant workers serve around the globe; mostly young men are involved in this process. Around 2.5% of total population of the country work outside the country and this percentage correspond to global statistics of migration (Pakistani Institute of Legislative Development and Transparency, 2008). These expatriates have strong connection with their native land as they are regularly

visiting their families. However they are not present all the time to fulfill their day to day responsibilities.

This activity affects family dynamics and social fabric at large by change in the responsibilities and tasks performed by an individual. This becomes more obvious when we talk about gender roles. Expatriation by the male family member also brings changes in the stereotypical roles of men and women in the society. Male expatriation may also mean women left behind have a greater role in household decision-making, or greater interdependence with the joint family (if they are living in that family system). Mostly this situation increases stresses, vulnerability, and an increased workload (Srivastra, 2003).

The present study intends to investigate psychological consequences of husband absence (expatriation) on wife's mental health. Researches have supported that the time duration spent by the females (wives) away from their husbands in such cases can be very helpful in determining the emotional and psychological problems such as loneliness, depression and anxiety among the family members of those who have expatriated (Srivastra, 2003; Population Council Field Research, 2003). The more time the male earning figures spend away from their families; there is more likelihood of emotional and psychological problems in their families who live behind. Although the whole family is affected but the present study is aimed at assessing the depression and loneliness among the wives of the expatriates.

### ***Relationship between Loneliness and Depression***

Several studies have established a significant positive relationship between loneliness and depression. But on the contrary the literature supports that much of the work on the adults' loneliness does not incorporate the marital status into its model (Johnson and Mullins 1989; Schwab and Peterson, 1990). Psychiatric epidemiological studies consistently identify high rates of depression and other neurotic illnesses in women and the gender ratio of these disorders in the sub-continent is higher than the gender ratio in the West (Mumford, Saeed & Ahmed, 1997). Smaller scale studies of mental health and illness found that a variety of disorders such as depression and post-partum depression are strongly associated with marital problems, particularly maltreatment by the in laws, husband's expatriation and the load of workload (Patel, Rodrigues, & DeSouza, 2002). These problems are more prevalent in patriarchal societies like Pakistani society.

In a cross-cultural study by Karasaz (2005), it was found that Indian and Pakistani women whose husbands are living in USA consider themselves more sensitive and get depressed more easily. It was also seen that many women associated illness with isolation and confinement in the home. Managing a family in

the absence of the husbands becomes difficult, as one has to perform dual responsibilities. Furthermore living in a nuclear family increases the wife's burden as well as increases her loneliness in the decision making process.

While on the other hand living in a joint family increases her interdependence which challenges their decision making and autonomy in the absence of their husbands. In a joint family system two to three generations of a unilineal descent live together as one family unit under the authority of one family member. In Pakistani joint family system usually the elderly male is the authority figure for handling the financial issues, major decision making such as education, career and marriage of the young generation. The elderly woman possesses limited authority over household matters, so young women living with in-laws have little say in decision making at both level. After husband's expatriation to other country, women living in joint family are subjected to strict supervision and regulation (Desai & Banerji, 2008).

It has also been seen that because of the male expatriation, the social network of the females is affected negatively. They feel, isolated, overburdened and lonely. A research by Farooq and Javed(2009) on wives of migrants living in the rural areas of Central Punjab, Pakistan reported loneliness, added responsibilities, negative effects on education of children, debt obtained to finance emigration, and increased anxiety for communication as result of their husband expatriation. However this study did not focused directly on the psychological distress as measured in clinical terms.

### ***Significance of the study***

This study would be an effort to examine the incidence of loneliness and depression among the wives of the expatriate husbands. The findings of this study will be helpful and important for the families to understand that how the behavior and functioning of the married females is affected when their husbands migrate to other areas and spend a lot of time in the absence of each other. This study would, therefore, be significant for the planners to keep in view how the loneliness and depression can lead to mental and behavioral problems.

### ***Hypotheses***

There is a positive relationship between loneliness and depression among the wives of expatriate husbands.

Women living in joint family system experience more psychological distress as compared to those living in nuclear family system.

**METHOD**

***Participants***

For the present study ‘non probability purposive sampling technique’ was used for the sample selection. The sample consisted of 50 women (aged ranged 18-65) from the twin cities of Rawalpindi and Islamabad, Pakistan. Women who were married for at least one year and their husbands living abroad for at least 6 months after marriage were included in the present research.

The following table depicts the frequencies (f) and percentages (%) for the demographic characteristics of the participants.

*Table 1*

*Frequencies (f) and percentages (%) for demographic variables in terms of age, education, occupation, and number of children (N = 50)*

Variables	Categories	f (%)
Age	15-25 Years	6(12)
	26-36 Years	18(36)
	37-47 Years	16(32)
	48-58 Years	8(16)
	59-69 Years	2(4)
Education	Matriculation(up to high school)	10(20)
	F.A(up to 12 grade)	
	Graduation & above(college education)	12(24) 28(56)
Occupation	Home makers	
	Working female	37(74)
Number of children	No children	13(26)
	1 child	
	2 children	14 (28)
	3 children	3(6)
	4 or more children	8(16) 10(20) 15(30)

***Instruments***

The following instruments were used in the present study.

***a. Demographic Sheet***

The demographic details were taken which included age, academic qualification, marital status, occupation, years of marriage, number of children, and name of the country where the husband lives, visits made by husband per year and the family system (living in nuclear family system or joint family system).

***b. BDI – II (Beck Depression Inventory)***

BDI developed by Aaron Beck is the most widely used screening instrument for depression throughout the world (Beck 1996). BDI-II is a 21 item self-rated instrument which evaluates the key symptoms of depression including mood, pessimism, sense of failure, self dissatisfaction, guilt, punishment, self dislike, self-accusation, suicidal ideas, crying, irritability, self withdrawal, indecisiveness, body image change, work difficulty, insomnia, fatigue, loss of appetite, weight loss, somatic complaints and loss of libido. It takes 5-10 minutes to complete. Individuals are asked to rate themselves on a 0-3 spectrum (0=least, 3=most), with a score range of 0-63. The total score is a sum of all of the items. The standard cutoffs for BDI are as follows: 0-9 indicates that a person is not depressed, 10-18 indicates mild depression, 19-29 indicates moderate depression, and 30-63 indicates severe depression. Higher total scores indicate more severe depressive symptoms. These standard scores are also used in the present research.

***c. DLS (Differential Loneliness Scale for Non-student Populations)***

Differential Loneliness Scale was developed by Schmidt & Sermat in 1983. It is used to assess loneliness or social isolation. It is a 60 items dichotomous scale (True-False). It is a self-administered scale. It takes 15-20 minutes to get this scale filled form a single participant. It has four subscales, which are Family (F), Romantic/Sexual relationships (F/R), Friends, and Groups/ Community. High score indicate presence of loneliness in the individual.

***Procedure***

The data has been collected by one to one interview after taking written consent from each partaker that decreased number of participants from 64 to 50. Firstly the participants filled the demographic data sheet .The two scales BDI-II and DLS were administered individually with instruction. Each respondent took around 30-45 minutes to complete the protocol (demographic sheet, BDI and DLS). The whole data collection procedure took about one and a half month to complete.

**Results**

The data was analyzed through Statistical Package for Social Sciences (SPSS). Descriptive statistics were computed for demographic characteristics and Pearson correlation was also computed to assess the relationship between depression and loneliness. Furthermore the independent sample t-test was also computed to assess depression and loneliness based on family system in which they were living.

*Demographic profile of participants*

The results revealed that majority of the participants were within the age range of 25 – 36 years (36 %) and 37 – 47 Years (32 %). Most of the participants have completed graduation (56 %), but this percentage does not reflect education trend as this data was based on purposive sampling technique. Most of the females were homemakers (74 %) and the remaining (26 %) were earning as well. Majority of the participants (30 %) have 4-5 children.

**Table 2**

*Frequencies (f) and percentages (%) values for marriage related variables (N = 50)*

Variables	Categories	f (%)
Number of years in marriage	1-5 Years	
	6-11 Years	14(28)
	12-16 Years	7(14)
	17 Years and above	6(12)
		23(46)
Visits of husband made per year	No visits made per year	
	Once a year	
	Twice a year	14(28)
	Thrice or more times in a year	26(52)
		7(14)
Family system	Joint Family System	3(6)
	Nuclear Family System	
		29(58)
		21(42)

The results of the *table 2* depict that most of the visits made by the husbands per year is once a year (52 %). It has also been revealed that (58 %) of the females were living in joint family system and the remaining (42 %) was living in nuclear family system which indicates the trend of living with in-laws in this part of world due to socialization preferences.

**Table 3**

*Levels of depression among wives of expatriate husbands (N = 50)*

Variables	Categories	f (%)
No depression	0 – 9	13 (26)
Mild depression	10 – 18	12 (24)
Moderate depression	19 – 29	9 (18)
Severe Depression	30 – 63	16 (32)

The above table indicates that majority of participants (32 %) were in the range of

30 – 63, means that most of them are suffering from severe depression that is affecting psychological health whereas only 26 % did not reported depression.

**Table 4**

*Correlation between Depression and Loneliness in Married females (N = 50)*

<i>Loneliness</i>	<i>Depression</i>
	BDI
DLS Total	.62**
Family Subscale	.42**
Sexual relationships Subscale	.66**
Friends Subscale	.37**
Groups/ Community Subscale	.46**

\*\* Significant at the level of 0.01

The *table 4* presents a significant positive relationship between depression and four domains of loneliness. The most significant relation is found in the domain of Romantic/ Sexual relationships and depression ( $r = .66^{**}$ ).

**Table 5**

*Independent sample t-test for Loneliness and Depression based on Family System (N=50)*

Variables	Groups		95% CI		t-value	p-value	LL	UL	Cohen's d
	M	SD	M	SD					
Females living in Joint Family System (n=29)	21.3	14.1	20.9	14.2	0.11	0.91	.30	14.28	.03
Females living in Nuclear Family System (n=21)	29.1	11.9	21.8	12.5	2.1	.04	-7.70	8.61	.61

The results of the *table 5* show that there are no significant differences in terms of depression among the married females living in joint and nuclear family system. On the contrary it is demonstrated that females living in joint family system have significantly high scores on loneliness as compared to those living in nuclear family system.

**Table 6**

*Mean scores on Differential Loneliness Scale (N=50)*

Loneliness	Total	Joint Family System(n=29)	Nuclear Family System(n=21)
DLS Total	26.04 ± 12.55	29.10 ± 11.85	21.81 ± 12.52
Family Subscale	6.46 ± 5.14	8 ± 5.59	4.33 ± 3.57
Sexual relationships Subscale	5.38 ± 3.75	5.48 ± 3.92	5.24 ± 3.58
Friends Subscale	11.02 ± 5.61	12.21 ± 5.25	9.38 ± 5.80
Groups/Community Subscale	3.18 ± 2.15	3.41 ± 2.08	2.86 ± 2.26

**Table 7***Cross tabulation for Depression based on Family system (N = 50).*

Variables	Categories	f(%)			
		No depression	Mild depression	Moderate depression	Severe depression
<i>Family System</i>	Joint Family System	9 (31)	3 (10)	7 (24)	10 (35)
	Nuclear Family System	4 (19)	9 (43)	2 (10)	6 (29)

The above table shows level of depression as measured by BDI. Women living in joint family system show high percentage of severe depression (35%) as compared to those living in nuclear family system. Moreover women in nuclear family system reported high scores on Mild to moderate depression category (43%). This pattern can be explained in relation to loneliness experienced by participants (Table 5) which is further explained in the discussion section.

## DISCUSSION

The results of the present study supported the assertion that the females whose husbands are employed abroad are prone to experience loneliness and depression. Married females demonstrated significant positive relationship between depression and loneliness in all of the four domains of loneliness with highest correlation in depression and Romantic/sexual relationships domain. Limited number of researches has catered this component especially from developing and Muslim countries like Pakistan where publically discussing such relations is not appreciated. This component can be explored further for understanding the dynamics of husband/wife relations in absence of immediate physical contact.

The demographic characteristics of participants showed that most of them were home makers (74%) and having 3-4 children (30%). This depiction is consistent to the demographic profile of the country where mostly women stay at home and do not earn with employment ratio of women is 22.2% (Pakistan Bureau of Statistics, 2012). Staying at home is also connected with loneliness, lack of idea sharing and financial dependence. Being a housewife is considered as risk factor for common mental health disorders in Pakistan (Mirza & Jenkins, 2004). This could be one of the reasons for high percentage of depression reported by the participants.

With reference to family system it has been reported that majority of them were living in joint family system (58%), which is also consistent with demographic trends in subcontinent. As reported by de Haan (2006 cited in Desai, 2008), wives of migrated husbands in India usually stay with old male relatives of their husband chaperoned by female relative. Staying alone especially for young women is not the norm. Women living in this type of family spend most of the time in household chores, looking after their children and parent in-laws. This overburden, seclusion and isolations limits them to their house and their friendship circle narrows down and they may feel isolated and lonely in the absence of their husbands for longer durations. A Pakistan based study indicated role differentiation linked to lack of authority, seclusion lack of confidence among married females (Taqvi, Itrat, Qadwai, & Qadri, 2007). The finding of present research supports this notion where high rate of depression and loneliness are reported by women living in joint family system (Table 5 & 7). In my knowledge, this is the first study in Pakistan that explored the relations between loneliness and clinical depression on the basis of family system. It is to be noted that that presence of many individuals in home does not imply more interaction and stronger bonds.

It has been presented in literature that loneliness is leading cause of depression (Barg, Ashmore, Wittink, Murray, & Bogner, 2006; Cacioppo, Hughes, Waite, Hawkey, & Thisted, 2006). These studies mostly focused on the older adults living alone. Limited empirical data is available on loneliness and depression experienced by couples. The present study does not intend to establish casual relation between loneliness and depression due to limited sample size. However significant correlation has been established in these variables (See Table 4) with highest correlation in Romantic/Sexual relationships sub-scale and depression. One possible explanation is the nature of relation/intimacy with partner. Previous researches showed that support provided by friends and neighbors may not adequately substitute for husbands. The lack of the emotional ties and intimacy between the wives and husbands produces weaker support networks and generates feelings of loneliness among them (Cantor, 1979, Barg, Ashmore, Wittink, Murray, & Bogner, 2006). The same trend has emerged in Table 5 with highest mean score on loneliness in romantic relations domain. So on the basis of the results presented above it can be concluded that loneliness and depression are related to one another as well as to demographic variable such as husband absence and family system. An interesting finding related to high scores on loneliness and depression of women living in joint family system requires further explanation. Male labor expatriation creates changing social structures and leads to sex role restructuring, psychological stress on women, female headed households, and changes in the

household decision making patterns (Okeyo, 1979). In a nutshell, the findings of the present study have demonstrated that there is a positive relationship between clinical depression and loneliness among the wives of the expatriate husbands.

The present study has certain limitations such as limited number of participants, inclusion of educated females, and age limit. It is therefore suggested to do the comparison on the basis of education level, employment status of wives and women with & without children. The findings of the present study revealed that male labor expatriation is an important contributor in mental and behavioral problems. It is suggest that the families of the married females may understand the fact that the female performance can be affected negatively owing to husbands' expatriation so family members may provide maximum support, appreciation and acknowledge their work in order to decrease the chances of isolation and depression in this group.

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## **Socio-demographic profile of socioeconomically disadvantaged internal migrants in Delhi**

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**Abstract:** *Macro studies reveal that internal migration is of considerable extent in India, however disaggregated studies on specific migrant groups are lacking from India. The present study is based on a scientifically drawn sample of 10,428 migrant households living in Delhi and the objective is to present socio-economic profile of the socioeconomically disadvantaged migrants living in Delhi. Migration is predominantly male in character and is dominated by younger ages. Migrants form a considerable proportion of the city's population and are indispensable for the city's growth. The other characteristics of migrants reveal that migrants are marginalized in the city and have denied access to basic amenities and compromise to live in such conditions in order to earn a livelihood and better incomes. Since migrants are an indispensable population in the cities, they should be recognized as a specific vulnerable group for the provision of basic services and there is a need for policy formulation ensuring rights of the migrants.*

**Keywords:** *Internal migration; Socio-economic disadvantage; poverty; Delhi; India*

### **Introduction**

Migration is a key feature throughout human history and at present represents an important livelihood strategy, mainly for the poor in many of the world's poorest countries. The Human Development Report of the United Nations Development Program (UNDP) estimated that there are approximately 740 million internal migrants and 214 million international migrants (United Nations Development Program, 2009). Migration is a form of mobility in which people change their residential location across defined administrative boundaries for a variety of reasons, which may be involuntary or voluntary, or a mixture of both. The decisions on whether to move, how, and where are complex and could involve a variety of actors in different ways. UNDP defined internal migrants as those individuals who move within the borders of a country, usually measured across regional, district, or municipal boundaries, resulting in a change of usual place of

residence. In India, internal migration is a common phenomenon with the National Sample Survey Organization (NSSO) of India estimated that in 2007-08 there were 326 million internal migrants (i.e., 28.5% of the population) (National Sample Survey Organization, 2010). The provisional results for Census of India 2011 show that urban population in India has touched 377 million and 31.16% of the total population are living in urban area against 27.78% in 2001. Several causes for this urban growth include natural population growth, reclassification/urban reconfiguration and migration. Bhagat and Mohanty (2009) estimated that there is 20.8% of internal migration and this has contributed to 9.2% of urban growth in the decade 1991-2001.

The benefits of internal migration are often not recognized despite the fact that migrants are a necessity for developmental activities in cities. In India, rural-urban migration is on the rise due to rural impoverishment, rapid industrialization, a strong desire for upward economic mobility and an attraction towards the cities. However, it appears that migrants are having difficulty coping with urban living and are becoming vulnerable in the new environment. On one hand, rapid urban development attracts many people, particularly the poor in the background of rural impoverishment livelihood insecurity.

India has embarked upon the new economic policy in the year 1991- popularly known as liberalization of the Indian economy. This economic policy believed that economic reforms would increase internal migration. Thus, migration has become an important phenomenon from economic, political and public health points of view (Bhagat, 2008). Interestingly, Bhagat (2008) highlighted that it is not just the poor and disadvantaged who are migrating, but a larger proportion of migrants belong to better off sections of Indian society and also the trends reveal that inter-state migration has drastically increased from 24% in 1971-81 to 54% in 1991-2001 Census and it coincides with economic liberalization Indian economy since 1991. In the last two decades or so, capital has become hugely more mobile. The verdict on whether labour too has become more mobile is still not out, although many would argue that population and workers have also become somewhat more mobile, both nationally and internationally (Srivastava, 2011).

Despite its importance, migration has received less attention by the scientific community. Bhagat (2008) criticized that migration research finds low priority among Indian Demographers, and attributed it to that a paradigm shift in the demographic research tilting to the issues of reproductive health that has occurred since the early 1990s. He further criticized that demographic health surveys (known as National Family Health Surveys- NFHS) did not consider migration as an important variable affecting the health status in general and

reproductive health in particular. However, it may also be noted here that in third round of NFHS, one question was introduced to classify one as a migrant or non-migrant and Bhagat (2008) expressed this as a new hope that this would spur migration research focusing on migrant, non-migrant differentials in fertility, reproductive health, HIV/AIDS and child mortality, etc. in future. Bose (2003) criticized that migration is grossly neglected by Indian demographers who are busy with data collection exercises funded by external agencies (Bose 2003), as a result of which there were very few recent demographic studies on India's internal migration and its causes and consequences.

Data on internal migration in India is principally drawn from two main sources in India – the decennial population Census and the quinquennial migration surveys carried out by the National Sample Survey Organisation. Both these sources provide a wealth of data on migration. The Census defines a migrant as a person residing in a place other than his/her place of birth (Place of Birth definition) or one who has changed his/her usual place of residence to another place (Change in Usual Place of Residence or UPR definition). The Census as well as the National Sample Survey, defines a resident as one who has been staying in a location for six months or more. However, at present, Census results for migration are available only till 2001. The data on migration by last residence in India as per Census 2001 shows that the total number of migrants was 31.4 crore. In the decade 1991-2001, about 9.8 crore persons migrated to a new place from their place of last residence. Out of these migrants by last residence, 8.1 crore were intra-state migrants, 1.7 crore inter-state migrants and 7 lakh international migrants. The largest volume is confined to migration from one part of the State to another.

As we know that migration is diverse, and a higher proportion of migrant's attention has generally been focused on different groups of internal migrants and a great deal of analysis has focused on the poorest segments. In the Census of India, Migration on account of change of residence by women after marriage constitutes significant proportion of these migrants. However, in the present study migration due to marriage is not considered to define migration, and it is rather considered as a shift from one household (natal) to the other (conjugal). The migration of the head of the household is considered to define a household's migration status, with an exception of single member households.

### **Study Area**

Delhi, the national capital of India is located at 28°61' N and 77°23' E. According to 2001 Census of India, the population of Delhi was 13,850,507 and in 2011 it rose to 16,753,235 against the projected population of 18.4 million (Census

of India, 2011), and the National Sample Survey Organization estimated that 42% of the Delhi's population are migrants (NSSO, 2010). There was a declining trend in the decennial growth rate of Delhi from 47.02% during 1991- 2001 to 20.96% during 2001-2011 and this decline has been attributed to the development of NCR priority towns viz., Gurgaon, Faridabad, Sonapat, Noida, Ghaziabad, Meerut etc., and also been attributed to implementation of various employment schemes like Mahatma Gandhi National Rural Employment Guarantee Scheme (MNREGA) and pension schemes (Government of National Capital Territory of Delhi, 2013). The 2011 revision of World Urbanization Prospects by the United Nations ranked Delhi as the second largest urban agglomeration with 23 million population (United Nations, 2013). The rapid developmental activities taking place across the Delhi agglomeration act as pulling factor for several people, particularly those from the low socioeconomic strata, whereas the poverty and lack of work to earn act as pushing factors in the rural villages. Estimated figures say that 200,000 to 300,000 people a year settle in Delhi permanently from other states in India as migrants. After Mumbai, Delhi has the second largest slum population in India. Nearly 1.8 million people lives in slums in Delhi. According to the 58th round of NSSO survey, there were 1867 slums in Delhi, out of which around 83% are non-notified slums. The Government of Delhi has been regularizing the unauthorized slums and upgrading the Juggi-Jopri (JJ) clusters and providing some basic amenities. Economic Survey of Delhi (2008-09) reported that there are about 1100 JJ Clusters with 6 lakh households. The Government of National Capital Territory (NCT) of Delhi has noted that about 35% of Delhi population is living in the JJ clusters and unauthorized colonies (Government of National Capital Territory of Delhi, 2009). The migrants often find a place to live in slums/JJ clusters/other deprived areas or live in informal migrant camps. Based on the NSSO data of 2007-08 on migration, around 20% of the migrants in Delhi are earning less than Indian Rupees (Rs.) 1500 (approximately US dollars 25) per week (National Sample Survey Organization, 2010).

The socio-economically disadvantaged mainly live in slums; temporary settlements nearer to work sites, in government lands, along with railway tracks, under the flyovers/foot over bridges, and on the foot paths; and even in open spaces. We describe these areas briefly hereunder. Resettlement colonies are mainly composed of low socioeconomic groups, and their residence is legal, and the government provides basic amenities to its residents. Many of the settled-migrants own their houses in resettlement colonies. Several resettlement colonies have been set up and sold at subsidized price by the government in order to provide better housing/living conditions to its residents, who have migrated and made their abode in Delhi. The residents of resettlement colonies are those who were able to bag this

opportunity and were able to afford for a house in these colonies. However, there are people living in substandard houses/huts in Delhi though they have migrated long back and are still confined to live in slums. Hence, the habitation in a resettlement colony is indicative of relatively better living conditions with better housing and other civic amenities within the low socioeconomic strata. Slums are semi legal squatter settlements and are mainly inhabited by those who are socially marginal and who have not been able to attain economic stability, despite having migrated long back. Generally, new migrants find a place to stay either by setting up huts with cheap/waste material or by paying minimal rents in these localities. The slums are semi legal in the sense that they do not have legal recognition, and the authorities can evacuate them; still, people living in these areas, own their houses and even sell to others while moving to another area of the city or elsewhere. Also, the government provides some basic amenities to residents of these areas. However, some slums are better off in terms of possession of basic amenities while others lack basic amenities and are usually characterized by open drainages, houses are not aligned in proper streets and often constructed in a haphazard manner, often single room hutments usually without a sanitary latrine. Whereas few slums are legal in character known as notified slums, and have better access to basic amenities. In the present study since we have very few notified slums, we have clubbed them with the slums with better amenities. It may also be mentioned here that the government of National Capital Territory of Delhi has started the process of recognizing and authorizing these slums in a phased manner and the process is under slow progress. Several of the present study slums with better access to basic amenities are in the process of getting notified by the government. The objective of the present study is to present a brief socio-economic profile of the disadvantaged migrants living in Delhi.

### **The Sample**

The present data were collected as a part of two major research projects carried out for assessing migrants' access to government healthcare services and access to health insurance. Initially, several slums/resettlement colonies and other probable areas where migrants reside were identified by visiting and enquiring from the local community and community leaders. Only those slums, where considerable proportions (15-20%) of new migrants live were considered for inclusion. Temporary settlements nearer to work sites were included as a higher proportion of newer migrants tend to live in these settlements. Thus, a total of 330 clusters (Eighteen resettlement colonies, 55 slums with better basic amenities, 162 slums with poor basic amenities, 70 temporary settlements nearer to work sites and 26

open spaces) were selected. Random selection procedure was followed to include households in to the sample. Thus, a total of 10,530 households were randomly selected for inclusion in the study. However, 63 households refused to participate and 39 schedules were of incomplete information. Finally, complete data were available for on 10,428 households. Socio-demographic details of the selected households were collected through face-to-face interview using a pre-tested questionnaire. Information pertaining to various socio, demographic details namely, age and gender of the respondent, educational details of the respondent, total family income, occupation of the head of the household, ethnicity, religion and their place of origin were collected. The purpose of the study was explained to the participants and their consent obtained before data collection. Permissions and co-operation were sought from the community members and leaders and worksite managers for conducting these surveys. The institutional ethics committee approved the study protocol. We categorized migrants into three groups based on the duration of migration viz., (i) those who have migrated within the last 5 years (here onwards referred to recent-migrants), (ii) those who have migrated for more than 5 years but not more than 10 years (here onwards referred to as settling-migrants), and (iii) those who have migrated and staying in Delhi at least for a minimum of 10 years (here onwards referred to as settled-migrants).

### **Analysis**

Out of 10,530 households, 63 households refused to participate and 39 schedules were of incomplete information and finally complete data were available for 10,428 households. The respondents were 5249 men and 5179 women.

#### ***Age and sex composition of the respondents:***

Table 1 describes age and gender wise details of the respondents. A majority of the respondents are younger. A majority of the respondents of the recent migrants are constituted by men (71.6%) and this owes to the fact that migration for livelihood reasons is mainly male in character, leaving their family at the origin in the initial period of migration.

#### ***Educational attainment***

Table 2 describes the details of educational attainment of the respondents by gender. A considerable proportion of migrant women (53%) and men (33%) did not receive any formal education. Around 40% of men and 23 to 28% of women received secondary level of education (6 to 10 years of education) and 15 % of the respondents were educated only up to primary level of education. It appears that if

people have had the chance of getting into the school, they are more likely to enter into secondary level of education. While gender disparities in educational attainment are conspicuous, there was not much conspicuous variation between various migrants groups. This obviously owes to the rural origin of the respondents, and people usually migrated to the cities during their teenage and early twenties and thirties, with an exception of few settled-migrants who have migrated in their childhood along with their parents. However, a considerable proportion of settled-migrant men (17%) and women (9%) attained higher secondary and graduate level of education compared to the other two groups. Slightly higher proportion of literates among settled-migrants may be attributed to the urban advantage.

### ***Type of residential area***

Table 3 presents the details of type of residential area, social class, religion, occupation of the head of the household, household income per month and state of origin by migration duration. A quick glance at the table reveals that the recent-migrants tend to live in temporary settlements nearer to the work sites (46%) and in unauthorized slum colonies (44%). Those who have migrated between 5- 10 years mainly lived in unauthorized slum colonies (63%), while a considerable proportion of settled-migrants live in resettlement colonies (24%) or in slums with better amenities (35%). It may also be noted here that around 6% of the migrants are living in open spaces. It reveals a trend that as they habituate to the city; they tend to set up their permanent/semi-permanent residence either by erecting their own hut or by paying little rents. The residents of resettlement colonies are those who were able to bag this opportunity and were able to afford for a house in these colonies. However, there are people living in substandard houses/huts in Delhi though they have migrated long back and are still confined to live in poor slums (35%). Hence, the habitation in a resettlement colony is indicative of relatively better living conditions with better housing and other civic amenities within the low socioeconomic strata. Few the better of slums are authorized by the government and are thus legal in character while a majority of slums are semi-legal in character. Semi-legal in the sense that they do not have legal recognition and the authorities can evacuate them; still, these slums have been existing for long and even expanding; people living in these areas own their houses and even sell to others while moving to another area of the city or elsewhere. Also, the government provides some basic amenities to residents of these areas. However, it may also be noted here that the government of National Capital Territory of Delhi has started the process of recognizing and authorizing these slums in a phased manner and the process is under slow progress.

### ***Social class and religion***

Regarding social class, a great majority of the migrants belong to scheduled castes and other backward castes. Composition of social class did not vary significantly by migration duration; however, there is slight increase in the migrants representing scheduled tribes among the recent migrants. Majority are Hindu by religion.

### ***Occupation of the head of the household and monthly income***

Regarding the occupational status of the head of the household, it was found that a great majority of the recent-migrants (66%) and those migrated between 5-10 years (74%) and around 50% of settled-migrants were engaged in unskilled work mainly working as daily wage labourers. Among settled-migrants around 13% are involved in small business, while 9% hold salaried jobs mainly in private companies and in state owned companies. The ability to secure a salaried job can be attributed to the fact that a higher proportion of settled-migrant men (17%) attained higher secondary and graduate level of education. Details on total household income per month are collected. The data reveals that a higher proportion of migrants (66% of recent-migrants, 68% of those migrated between 5-10 years, and 57% of settled-migrants) earn up to Rs. 5000 per month. Around 8% of settled migrants reported to earn between Rs. 8000-10000 per month and only 4% each of the recent- and settling-migrants reported to have a monthly income of Rs. 8,000-10,000.

### ***Place of origin***

Information on the place of origin is also collected and the data reveals that a greater proportion of migrants come from the states of Uttar Pradesh and Bihar followed by Rajasthan, West Bengal, Madhya Pradesh, Jharkhand. About half of the settled-migrant households originally belong to the state of Uttar Pradesh followed by 21% of them originally belonging to the state of Bihar. The states of Uttar Pradesh (37%) and Bihar (36%) almost equally contributed to recent migration. The details on the place of origin indicate that there are increasing proportion of migrants from the states of West Bengal, Madhya Pradesh and Jharkhand recently.

### **Discussion**

Though macro studies (Census of India and National Sample Survey Organization surveys) provide some details about migrated and larger trends in the migration flows, however, disaggregated information on migrants is often not available from these surveys. The data clearly shows that the poorer states still

contribute to the migration flows to the cities. And it may be mentioned here that for a greater majority (around 98%), the sole main reason for migration is earning a livelihood followed by better earnings. Usually the decisions to migrate are diverse and a variety of factors influence the decisions regarding migration across various socio-economic strata. But for the poor the sole reason tends to be livelihood search coupled with a slightly better wages. It may also be mentioned here that a major proportion of the poor migrants are engaged as temporary wage/casual labour. The present study reveals that the poorer migrants are often engaged as casual labourers with low paid and low earning jobs in informal sector. The casual and contractual nature of work itself brings forth the vulnerability of the poorer migrants and Srivastava (2011) writes that they often suffer from various deprivations and handicaps which also have to do with the nature of urban policies and absence of employer support.

Data on the social class affiliation of these migrants revealed that the poorer migrants are largely represented by the deprived sections of the society such as the scheduled castes and backward classes. Thus, migration of the poor is compounded with lower levels of educational attainment low social class affiliation and lower economic status all of which are interrelated. A major proportion of the earning members of the family are found in temporary/ daily wage the poor to securing livelihood and at the same time cities need labour force in order to carry out the ongoing developmental activities. However, despite the fact that migrants are an essential part of the city, their needs are often ignored and present data clearly reveals their living conditions and the continuing low socioeconomic conditions. Migrants often lived in dilapidated, unhygienic living condition with gross lack of basic amenities (water supply, sanitation and access to social services). The poorer migrants are often represented by vulnerable social classes namely scheduled castes and other back ward castes. Also, there is an increasing trend of migration from the schedule tribes who constitute around 8% of the India's population. Thus, the migrants' vulnerability is multifaceted. Vulnerability here is defined as a state of being exposed to or susceptible to neglect or abuse. This vulnerability leads to less control over the resources that are meant for all communities including migrants. It is obvious that urban migrants are affected by livelihood insecurity, negligence and alienation in the new sociocultural environment. This situation impedes the integration of migrants into the local population. Since migrants form a considerable and essential group in cities, meeting their basic needs, including providing better access to other social services, is the responsibility of the state. It is a pre-requisite for the system to recognize migrants as a vulnerable group that needs targeted interventions for improving their living conditions and access to various

state sponsored services. Internal migrants face numerous constraints, including lack of political representation; inadequate housing and lack of formal residency rights; low-paid, insecure or hazardous work; limited access to state provided services such as health and education.

We were not able to capture the female migrant workers who mainly migrate for domestic work and stay with the employers families and are mainly recruited through some agencies meant for supplying domestic servants, and it is also difficult to include them in the study owing to the difficulties in identifying and getting consent them from the employer's households. Also, it is known that mainly these domestic workers are constituted by young girls, with their families in the native. Our data mainly constituted by the migrants working in various construction work sites, factories, living in slums and resettlement colonies.

### **Conclusion**

Migrants form a considerable proportion of the city's population and are indispensable for the city's growth. The present study reveals that these migrants are characterized by younger age profile and lower social profile with lower levels of educational attainment and uncertain employment with a majority involved in unskilled work. They are marginalized in the city and have denied access to basic amenities and compromise to live in such conditions in order to earn a livelihood and better incomes. Since migrants are an indispensable population in the cities, they should be recognized as a specific vulnerable group for the provision of basic services and there is a need for policy formulation ensuring rights of the internal migrants.

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**Table 1**

*Age and gender wise composition of the participants by migration duration*

Age group	Migration duration									Total sample		
	Within last 5 years			5-10 years			More than 10 years			Men n (%)	Women n (%)	Both n (%)
	Men n (%)	Women n (%)	Both n (%)	Men n (%)	Women n (%)	Both n (%)	Men n (%)	Women n (%)	Both n (%)			
<20 years	928 (33.3)	157 (14.2)	1085 (27.8)	171 (13.6)	100 (10.6)	271 (12.3)	110 (5.0)	310 (9.9)	420 (9.7)	1209 (23.0)	567 (10.9)	1776 (17.0)
20-30 years	1263 (45.3)	772 (69.7)	2035 (52.2)	724 (57.7)	644 (68.2)	1368 (62.2)	367 (16.7)	1186 (37.9)	1553 (35.8)	2354 (44.8)	2602 (50.2)	4956 (47.5)
30-40 years	405 (14.5)	137 (12.4)	542 (13.9)	240 (19.1)	174 (18.4)	414 (18.8)	397 (18.1)	974 (31.1)	1371 (31.6)	1042 (19.9)	1285 (24.8)	2327 (22.3)
40-50 years	136 (4.9)	35 (3.2)	171 (4.4)	92 (7.3)	18 (1.9)	110 (5.0)	206 (9.4)	417 (13.3)	623 (14.4)	434 (10.2)	470 (9.1)	904 (8.7)
> 50 years	58 (2.1)	7 (0.6)	65 (1.7)	27 (2.2)	8 (0.8)	35 (1.6)	125 (5.7)	240 (7.7)	365 (8.4)	210 (4.0)	255 (4.9)	465 (4.5)
Total	2790 (71.6)	1108 (28.4)	3898 (100.0)	1254 (57.1)	944 (42.9)	2198 (100.0)	1205 (27.8)	3127 (72.2)	4332 (100.0)	5249 (50.3)	5179 (49.7)	10428 (100.0)

n = number

**Table 2**

*Educational attainment by the migrants by gender and duration of migration*

Variable	Migration duration									Total sample		
	Within last 5 years			5-10 years			More than 10 years			Men n (%)	Women n (%)	Both n (%)
Men n (%)	Women n (%)	Both n (%)	Men n (%)	Women n (%)	Both n (%)	Men n (%)	Women n (%)	Both n (%)				
No formal education	982 (35.2)	654 (59.0)	1636 (42.0)	419 (33.4)	550 (58.3)	969 (44.1)	327 (27.1)	1523 (48.7)	1850 (42.7)	1728 (32.9)	2727 (52.6)	4455 (42.7)
Primary ed. (1-5 years)	436 (15.6)	153 (13.8)	589 (15.1)	228 (18.2)	129 (13.7)	357 (16.2)	184 (15.3)	419 (13.4)	603 (13.9)	848 (16.2)	701 (13.5)	1549 (14.8)
Secondary ed. (6-10 years)	1124 (40.3)	258 (23.3)	1382 (35.5)	503 (40.1)	230 (24.4)	733 (33.3)	488 (40.5)	901 (28.8)	1389 (32.1)	2115 (40.3)	1389 (26.8)	3504 (33.6)
Higher secondary & above (10-12 years & above)	248 (8.9)	43 (3.9)	291 (7.5)	104 (8.3)	35 (3.7)	139 (6.3)	206 (17.1)	284 (9.1)	490 (11.3)	558 (10.6)	362 (7.0)	920 (8.8)
Total literates	1808 (64.8)	454 (41.0)	2262 (58.0)	835 (66.6)	394 (41.7)	1229 (55.9)	878 (72.9)	1604 (51.3)	2482 (57.3)	3521 (67.1)	2452 (47.3)	5973 (57.3)

n=number

**Table 3**

*Other characteristics of the participants by migration duration*

Variable	Migration duration			Total sample (n=10428)
	Within last 5 years (n=3898)	5-10 years (n=2198)	More than 10 years (n=4332)	

Variable	Migration duration			Total sample (n=10428)
	Within last 5 years (n=3898)	5-10 years (n=2198)	More than 10 years (n=4332)	
<b>Type of the residential area of inhabitation</b>				
Resettlement colonies	62 (1.6)	65 (3.0)	1055 (24.4)	1182 (11.3)
Notified slums & slums with better amenities	141 (3.6)	136 (6.2)	1501 (34.6)	1778 (17.1)
Slums with poor amenities	1714 (44.0)	1389 (63.2)	1508 (34.8)	4611 (44.2)
Temporary settlements nearer to work sites	1778 (45.6)	466 (21.2)	165 (3.8)	2409 (23.1)
Open space & Others	203 (5.2)	142 (6.5)	103 (2.4)	448 (4.3)
<b>Social class</b>				
Scheduled Tribes	125 (3.2)	31 (1.4)	46 (1.1)	202 (1.9)
Scheduled Castes	1296 (33.2)	777 (35.4)	1843 (42.5)	3916 (37.6)
Other backward Castes	1380 (35.4)	751 (34.2)	1356 (31.3)	3487 (33.4)
Uncategorized Castes	1028 (26.4)	633 (28.8)	1049 (24.2)	2710 (26.0)
Didn't reveal	69 (1.8)	6 (0.3)	38 (0.9)	113 (1.1)
<b>Religion</b>				
Hindu	3265 (83.8)	1828 (83.2)	3743 (86.4)	8836 (84.7)
Islam	609 (15.6)	360 (16.4)	526 (12.1)	1495 (13.3)
Other	24 (0.6)	10 (0.5)	63 (1.5)	97 (0.9)
<b>Occupation of the head of the household</b>				
Unskilled worker	2573 (66.0)	1626 (74.0)	2169 (50.1)	6368 (61.1)
Skilled worker	782 (20.1)	357 (16.2)	955 (22.0)	2094 (20.1)
Small business	126 (3.2)	92 (4.2)	544 (12.6)	762 (7.3)
Salaried job	182 (4.7)	85 (3.9)	377 (8.7)	644 (6.2)
Not working	39 (1.0)	22 (1.0)	157 (3.6)	218 (2.1)
Can't say	196 (5.0)	16 (0.7)	130 (3.0)	342 (3.3)
<b>Household Income per month</b>				
Up to INR 3000	1127 (28.9)	874 (39.8)	1369 (31.6)	3370 (32.3)
INR 3001-5000	1440 (36.9)	628 (28.6)	1093 (25.2)	3161 (30.3)
INR 5001-8000	1002 (25.7)	487 (22.2)	920 (21.2)	2409 (23.1)
INR 8001-10000	181 (4.6)	94 (4.3)	350 (8.1)	625 (6.0)
INR 10001-15000	100 (2.6)	69 (3.2)	339 (7.8)	508 (4.9)
> INR 15000	43 (1.1)	44 (2.0)	236 (5.4)	323 (3.1)
Can't say	5 (0.1)	2 (0.1)	25 (0.6)	32 (0.3)
<b>State of Origin</b>				
Uttar Pradesh	1441 (37.0)	983 (44.7)	2156 (49.8)	4580 (43.9)
Bihar	1419 (36.4)	851 (38.7)	921 (21.3)	3191 (30.6)
Rajasthan	67 (1.7)	53 (2.4)	506 (11.7)	626 (6.0)
West Bengal	316 (8.1)	98 (4.5)	81 (1.9)	495 (4.7)
Jharkhand	135 (3.5)	35 (1.6)	32 (0.7)	202 (1.9)
Madhya Pradesh	216 (5.5)	79 (3.6)	90 (2.1)	385 (3.7)
Other states	304 (7.8)	99 (4.5)	546 (12.6)	949 (9.1)

n=number



**WORK IN PROGRESS**



## **In the search of identity: the Romanian journalistic discourse and the function of Europeanization of the public sphere**

*Gabriela GOUDENHOFT*

**Abstract.** *This paper represents an introduction in the ongoing research on the search of identity of the journalistic discourse, identity able to contribute to the development of national public sphere and to its Europeanization.*

*I presented some of the ideas and theories on modern and postmodern communication and public sphere trying to see how they create place to European issues and what status they have in contemporary journalistic discourse.*

*Media interaction with national public spheres and the role of media in their transnationalization process is a complex one. In research of representations about EU and about major European themes and issues, which media create or transmit is important to emphasize the role these representations play both in public discourse and in the comprehension process. This is an ongoing research and I have chosen only one example of representations, that of personalization, the antropomorphism of Europe image, the analogy with a human body, with its strengths and weaknesses, but also a body able to act in distress under the influence of diseases with significant effects on our lives.*

*Romanian media is looking for its own identity linked to the European communication flow while European issues hardly make their way to our public space where the actors are aware of the lack of popularity of this topics, a deficit explained almost by their technicality and by the lack of a genuine European public.*

**Key words:** *public sphere, Europeanization, journalistic discourse, public comprehension*

*This paper is part of a more extensive, ongoing research, where, based on the actual trend in exploring the role of media discourse on the Europeanization of the national public spheres, I am trying to identify and evaluate how the Romanian journalistic discourse participates in constructing the identity of the Romanian national public sphere and also if and to which extent the Romanian press contributes to the Europeanization of the national public sphere.*

*About public sphere in recent years one writes and talks a lot but the hard core of discussions is the perspective of the German philosopher Jürgen Habermas so, without too much exaggeration, we can say that most theories on public sphere*

are edified on Habermas' thinking line or critically distancing of one or another of his ideas.

In an attempt to categorize the perspectives and positions on the public sphere, Koller and Wodak, have found three main theories: a late-modern school, a postmodern school and a relational school. „The first one builds on Habermas by accepting Habermasian prerequisites such as general accessibility to information, eradication of privilege, the quest for truth and the quest for general norms, along with their rational legitimisation”. (2008: 3)

How the public sphere Habermas thought, as a realm of our social life, a place where public opinion can be formed, guaranteeing democratic access to all citizens. „The fully bourgeois public sphere was based on the fictitious identity of the two roles assumed by the privatized individuals who came together to form a public: the role of property owners and the role of human beings pure and simple” (Habermas, 1991: 56).

This is nothing else than a reconstruction of Kant's normative conception shaping the public sphere, a space based on a free and equal access to democratic deliberation, a space where communicative reason can be the force dominating both citizens' conduct and democratic government development.

From this perspective it is obvious how mass media play a prime role in the Habermasian communication sphere (Ward, 2002, Goode, 2005), even paying the price of power manipulation. Thus, safeguarding and promoting democracy and citizenship, the media can be looked at as depoliticisation agents and they are expected to „expose, hold to account and dilute power” in the public sphere where they have to mediate. According to the Habermasian model of public space, mass media abolish the distance between actors, between inbound and outbound, creating „new modes of interaction based on visibility: media personnel occupy the *specialist* role of selecting, processing and producing vast networks of symbols and significant information (they are gatekeepers and agenda setters), discursively interrogating decision makers (they serve as advocates), and making accessible the world ‘out there’ (or, rather, selecting segments and constructing versions of it) on behalf of a more or less diffuse audience”. (Goode, 2005: 93-94)

The idea of public debate and the necessity of finding consensus according to a communicative ratio is a major one of the Habermasian school: „Public debate was supposed to transform *voluntas* into a ratio that in the public competition of private arguments came into being as the consensus about what was practically necessary in the interest of all” (Habermas, 1991: 83).

The post-modern school, on the other hand, has intended to open the public sphere to plurality: „Instead of one consensus-driven public sphere, many so-called

subaltern counter-publics exist: Parallel discursive arenas where members of subordinated social groups invent and circulate counter-discourses. Reason can thus be broken down into a myriad of practical and habitual modes of regulating public dialogue. (...) a postmodern conception of the public sphere: 1) it must acknowledge that participatory parity [is] not merely the bracketing, but rather the elimination, of systematic social inequalities; 2) where such inequality persists, however, a postmodern multiplicity of mutually contesting publics is preferable to a single modern public sphere oriented solely to deliberation; 3) a postmodern conception of the public sphere must countenance not the exclusion, but the inclusion, of interests and issues that bourgeois masculinist ideology labels “private” and treats as inadmissible” (Wodak, 2008: 3-4).

According to the relational or institutional school, social relations are the key concept of the public sphere, relations which are to be developed in a more complex institutional framework of cultural, economic, social and political practices. There some arenas are built and the public sphere is one of them, a place of „contestation and participatory negotiations” over political and social life. The public sphere is a place of dialog and discussion, of networks between individuals, citizens, groups, political actors, states etc.

There are research perspectives where the concept of public sphere is put forward in a global context, so it became a global public sphere. New patterns are available in this globalised world, were exchanges of goods, services, information, capitals but also the possibility of a larger dialog increased more and more over the years. The increased role of global organisation as it is World Bank and IMF, ONU, UNESCO, EU’s institutions proves not only the institutionalisation of the global, but also the paradox of our existence where the need of autonomy and the total dependence on consumerism are overlapping in an ambivalent way.

In a global perspective the axis of communication in the public sphere has an expansion from the national level to a transnational one, in what is called now „lifeworld”<sup>1</sup> (Volkmer, 2014). In this global public sphere it has being created a space of „interdependent public reflection”, where new forms of civic and democratic participation are able to be between the classic nation-state establishment and the new globalized governance area. This new space can be described as a reformed but also a negative one; it is a space which denies the qualities of the previous one, which denies rationality itself: a “non-national” and „nonterritorial”

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<sup>1</sup> „The lifeworld constitutes the space of interdependent ‘public’ reflection, enabled and sustained by subjectively selected ‘reflective’ networks.” (Volkmer, 2014: 163).

space, where „media scapes” populate the new communicative space by new structures and new networks.

On the other hand the idea of dispersion of power centers, of a polyarchy world, like Robert Dahl configured it, it is a fertile world for media to be revisited and reinvested with new functions including the one of rebalancing polyarchy where power is diluted and diffuse. Redressing the imbalance of power would be possible by “broadening access to public domain” all over the places where until now only privileged elites have had access and by rationalizing interests and resources invested in (Dahlgren and Sparks, 2005).

The press is an essential institution in cristalisation of the modern public sphere, even though commercialisation the flows of information, news and the communication space itself.

The history of press proves that „the press itself became manipulable to the extend that it become commercialized” (Habermas, 1991: 185). So here we go again revisiting Habermas’ perspective, because it is able to offer „a sounder basis for the critical analysis of current developments both in the media and democratic politics and for the analysis and political action necessary to rebuild systems of both communication and representative democracy adequate to the contemporary world” (Garnham, 1996: 364).

A specific form of transnationalisation the national public spheres make sense in Europe. It won the name of Europeanisation and it filled many pages of discussion, including the journalistic debate on the issue. If you want to discuss on international legitimacy, between global governance and EU governance it is easy to agree to the position that „the EU is by far the most likely candidate for democratic legitimation beyond the nationstate. And this is where the emergence of a corresponding *transnational public sphere* comes into play” (Wessler et al, 2008: 1). The greatest difficulty is that media have to mediate between the spheres, to be in the “forums”<sup>2</sup> and “arenas”, how we call the new forms of public spheres. Where does the difficulty stay in? It stays in the essence of plans which are fundamental different!

The possibility for a communication between different areas and systems, as is European institutional sphere and the national public sphere through the media and journalistic discourse is a very complex process; this possibility becomes a reality only in so far as it produces „cooperation” which is a prerequisite, „a precondition for all other forms of human cooperation”. But „what does it mean to

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<sup>2</sup> „The mass media forum constitutes an *integrated* network precisely because issues and opinions constantly circulate between various subforums and because the leading media exert a structuring effect on public debates.” - Wessler et al, 2008: 5.

cooperate at the fundamental human level of linguistic communication, the precondition for all other forms of human cooperation?"(Chilton, 2004: 197).

For this purpose it is necessary cognitive representations to be formed, based on common signs, significations, symbols, meanings and common interpretations, following the conventions which represent a social consensus. Conventionalist thesis of communication is perhaps a vivid illustration and it has also a maximum success with regard to the public sphere, where the need for the handling of shared meanings should not leave too much room for speculation.

There are representations of Europe, of European Union institutions and policies. Themselves do not concern us as much as cooperation between the journalists and the public on the involved representations and the specific journalistic discourse that takes place through negotiation and agreement on such representations. There are theories claiming that the sense of negotiation is not a very peaceful proces. Philip Eubanks argues that trade and business itself are true wars of negotiation: "Trade is War", "Bussines is War" (2000: 141) as he is stating in a paper which itself is called *A War of Words ...*

Generally one apreciates that the national public sphere it is caracterized by a denser interaction than at the transnational level and this means at a national level there is a specific well formed audience for the journalistic discourse and public speech, generally. Here a legitimate question arises: Where in Europe do we find media that address a European audience with specifically European content? (Wessler and all). Does Europeanisation mean both a European audience and European journalistic themes and issues? National spheres tend to transcend borders increasing audience and interest in issues and topics that are farther and farther in distance but closer and closer in auditor's interest. Being an European citizen all European problems seem to become your problems. But does it really happen? To what extent?

„National public spheres transnationalize, first, when European or other international *governance* processes become visible on the national level and can thus be *monitored* by citizens. This is achieved mostly through coverage and discussion in the national news media of decision-making processes in, for example, the European Union, the World Trade Organization or the United Nations" (Wessler and all, 2008:10). But in this case we assist mostly to an Europeanisation by object, the press adressed to a national public with European issues and not by subject as long as they are not concerned in creating a European public, a European audience. In this purpose citizens are to be involved and informed and they are expected to scrutinize EU institutions and EU policies. Monitoring EU gouvernance the debate is moved into another sphere of non-privileged elites, of the citizens, rebalancing the acces to relevant information.

The role of media is fundamental in this process, bringing together in a debate decisionmakers and citizens and opening the political field to a real, exhaustive world, just by using simple instruments as news, commentaries, forums etc. This seems also to be a „domestication” process of politics where press doesn’t simply report post-factum the news but put things into debate while they happen.

Europeanization of national public spheres is a topic often addressed in the latest research and one of the comments that always appears is a dynamic of a simultaneous „segmentated Europeanisation” replacing the actual Europeanization. But first of all we have to notice that Europeanisation process means mainly the formation or strengthening of the European identity, a theme nowadays also greatly debated. We can easily find a public discourse about Europeans as community members of communication, also on an „European topos”, even when it is used in a negative sense. But „we, Europeans”<sup>3</sup> hardly occurs in the public discourse, and the lack of the subjective identification and even the lack of a solidarity between „us, the Europeans”, the reluctance in taking and using this important "we" in the public discourse proves that the transnationalization of public spheres is slower than faster. That is the reason why a lot of authors (Wessler and all, 2008), have concluded that the transnational collective „we” is still hard to utilise even in public speeches of EU politicians, in the elite’s public discourse or even in quality newspapers. It seems to be more adequate to use the term *community*<sup>4</sup> instead the one of *demos* addressing

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<sup>3</sup> „The Europeans’ exists as a topos in public discourse and gradually gains more importance, recorded as constituting 6 per cent of all collectives mentioned in 1982 and rising to slightly above 10 per cent in 2003. ‘The West’ (12 per cent on average) is more common than ‘the Europeans’ (8 per cent on average), but has declined since 1989. In general we find that unlike the increasing European trend, the demand for other transnational collectives such as ‘the Communists’ or ‘the Muslims’ rises and falls according to the agenda of world politics. ‘We Europeans’: words rarely used (...) showing the explicit use of ‘we Europeans’, hints at a nascent trend towards the Europeanization of public identities. While ‘we’ references to the West stagnate and identification with individual nations drops between 1996 and 2003, ‘we Europeans’ increases slightly, from below 1 per cent in 1982 to 5 per cent in 2003. Looking at the level of identification, however, the nation is still the most frequent point of reference (40 per cent of all ‘we’ references) together with a broad range of very specific collective identities such as ‘we, the government’ or ‘we, the farmers’. Identification with Europe stands at 3 per cent on average; identification with ‘the West’ is even weaker” - (Wessler and all, 2008: 49-50).

<sup>4</sup> „Europe, even limited to Western Europe, is not a community of communications, barely a community of memory, and only a very limited community of experience’ (Kielmansegg 1994) - *Europa, auch das engere Westeuropa, ist keine Kommunikationsgemeinschaft, kaum eine Erinnerungsgemeinschaft und nur sehr begrenzt eine Erfahrungsgemeinschaft.* - Kielmansegg, P. G. (1994) ‘Lässt sich die Europäische Gemeinschaft demokratisch verfassen?’, in *Europäische Rundschau*, 22(2): 23–33, apud Bernhard Peters, (2005) „Public discourse, identity and the problem of democratic

Europeans. So post-Habermasian debates on Europeanization focused mainly on the crisis, the crisis of legitimacy of the EU targeting mainly European identity.

In all this process, media plays a distinctive role, using EU's topics in articles, talking about EU's policies, quoting EU politicians, reporting EU's institutions concluding documents, submits declarations etc., being actor of Europeanisation of the public spheres. An important question arises: is there a transnational media in Europe as a factor of Europeanization, participating in a European space of communication?

Eastern European Media had to face two relevant challenges: on the one hand to overcome their conservative frames and to define and revisit their own values and to adapt, jumping phases or burning stages, to a post-modernism communicational trend and to a liberal and neo-liberal ideology without experiencing it as much as the Western Europe did and, on the other hand to adapt and absorb, to accommodate with the values, aims and objectives of the European Union. This process sometime means to filter and interpret values through national vision and ethical philosophy when possible. This aspect, together with the maintaining even at a conceptual level of the segregation Est-West made possible a segmented European public sphere. National traditionally public spheres have difficulties in overlapping the frontiers of their communicative space, limited by language, values, interests and they tend to remain captive to these limits. While European Union development requires a new and common communicative space based on its integration policy and supranational structure, we assist to a fragmentation and segmentation of the public sphere caused by very regional and sub-state level which became increasingly distinctive (Eriksen, 2007).

Given the fact that Europe „has no essence *per se*”, being eventually „a discursive construct and a product of many overlapping discourses. Such hegemonic narratives (discourses) serve as part of the search for national (and European) identities” (Străth and Wodak, 2009: 15) Over all of this the current crises overlap bringing with it a very complex situation which blocks communication in topics related to this. Sometimes even media contribute to a fragmentation of public sphere by promoting static images and events, serving or being captive to economic or other type of interests.

Among other risks and limits, emphasised above, we have to outline the risk of populism and the need of audience, which is a major one for media dynamic. The tendency of political journalism is to be more analytical and more interpretative than it

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legitimacy” in E.O. Eriksen (ed.), *Making the European Polity Reflexive integration in the EU*, London and New York, Routledge, pp. 84-123.

use to be in the past, but also „less substantial”, more speculative, presenting opinion as facts sometimes, more „Americanised”, personalised, adversarial, sometimes hyperadversarial, in other words we assist to a general tabloidization of journalistic discourse. (Mc Nayr, 2002) We don't know if democratisation of the journalistic discourse should be accompanied by being „less deferential towards political actors” like McNayr has noticed, should be such commercial, should be more about persons instead about policies, but massification is a risk that political discourse, even in the shape of journalistic one, must challenge. The unprecedented mass participation on the political arena is reflected in the public sphere as a discursive mass representation, transforming media in what McNayr called „*media-ocracy*” with all the irony we can feel in the expression. These refer to a less quality in the public discourse generated by the phenomenon of unprivileged the public sphere. Of course there is an opposite reaction: a further and stronger conservative position, a claim for elite's need in the public sphere, *le connaisseur* should populate the communicational field in order to increase quality and to reestablish a desirable order in time of crisis. But the information, as a result of communication process must be in the ownership of the public in this democratic world. But „what do they do with it?” There are some legitimate questions occurring from this finds, on the possibility and will of public receptors and also about the limits of democracy.<sup>5</sup>

Turning to the pressure that need of audience and popularity media exerts, we must specify some findings. Along with a decline of ideologies, also reported by the political analysis, we can see an attempt of compensating the decline and, in order to clear the gap created by this sort of leaving legitimacy through populism, via political marketing or using instruments like campaign strategy, all of these generate a diminishing of elite media standards rather than increase or maintain them. They work merely to grow audience than to inform "(Blumer, 2005). So contemporary media, trapped in populism, on behalf of the need for high ratings and audience is compromising its quality wrapping information, especially when it is difficult and arid, in easily digestible packages.

In the news area about the EU legislative agenda, journalistic styles vary from the descriptive style to the interpretative style. Descriptive journalistic approach is governed by the 'facts' and events, while the interpretive approach

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<sup>5</sup> „ • what *can* they, and what should they *want* to do with it, given what is politically possible in current conditions?

• and is there, from the point of view of the efficiency and integrity of the democratic process, an optimal upper limit, as well as a lower, on the quantity of information flowing in a society, and on the amount of critical scrutiny exercised by the media over elites and their rhetoric?” (McNayr, 2002: 179).

focuses on topic around the story is built and this gives the journalist more control over messages. Using descriptive approach, journalists are primarily mediators, information providers, policy, events, news providers, while addressing an interpretative approach journalists become truly political actors involved in the debate and represented in the public sphere by their own voice (Patterson, 1997) .

But European topics aren't treated only in the intended news area, but sometimes in the editorials area, making room for opinions and journalistic commentaries on these issues.

Ensuring comprehension one is to structure a favorable relationship between the journalist and the receiver of journalistic discourse through a specific linguistic code of press.

EU issues must be known, they need visibility. This is ensured by the media. EU elites believe that a better coverage in the national media would increase the legitimacy of public institutions, especially since it is very obvious a perception of a lack of legitimacy in the European Union, owed also to the weak media's performance, this being an important factor for EU's image. It is known and accepted that the role of journalists as actors providing information on EU's issues in the public sphere is extremely important. We are talking about political journalism and coverage of European legislation, which opened a new horizon and new career opportunities for European journalists. In this perspective, journalists as professionals could have a better chance to educate and inform readers, especially about those events and policies dynamics that are unfamiliar like the EU issues are. Some issues are maybe intentionally left in a shadow zone by national governments, so this situation opens the possibility for journalists to shape political messages and to act as true leaders (Statham, 2010).

In order to familiarize the public with the subjects situated at a considerable distance from the public interest, as EU issues, journalistic language approach uses specific tools, creating specific representations, customizing, using metaphors, all in order to facilitate the transition from the unfamiliar to the familiar.

A constant journalistic language method applied on the European Union issues is the use of metaphor, analogy and personification. The European Union has the media image of a political body endowed with political and institutional powers and capable of action likely to affect European peoples. If traditional political body representations were made especially on the nation-state and socio-economic systems involved, the European Union is a more complex and ambiguous case, given its confederalist status, supra-statal level and its political and legislative controversial system (Musolff, 2004). The idea of representing the state as a political body is quite old and it emerged a series of metaphors, analogies,

personifications; so did the idea that being an alive body, like a living human being the state also can be healthy or sick, he may suffer of many diseases like corruption, anarchy and the illness can lead finally to collapse. Also another idea resulted from the one of state personification, that of State's speech or public speaking, as the one of public policy as strategies of the national or supranational entities in their quality of political bodies. In journalistic discourse generator of strong representations, political bodies are endowed with powers and qualities of human beings: they can talk (they use to have public discourses), make decisions, they can get sick and recover, briefly they are invested with features, powers and weaknesses that human beings have.

Political discourse reflected by the European press is replete with examples of metaphorical concepts of "European body", its "organs" with its health problems they face: the formula "*the sick man of Europe*" with its German version "*der kranke Mann Europas*" it is already well-established even if used as a stigma sometimes against Great Britain, Germany or Greece, and even on Spain. But which is the virus in this viral process? The virus carrier is no one else but the „untimely born child of Europe”, Euro currency, accompanied by all the crisis that he could cause.

The entire Europe is sometimes represented as a human being hit in the heart of a fatal disease and gained names, stigmatized by the press: *Eurosclerosis*, *eurosis* or *Anorexia Europa*. The terms began to be taken over the major European politicians discourse. And even if Helmut Kohl proclaimed that "Europe has healed Eurosclerosis" in the late 80s, following decades of the century proved that things are not just so well and what Kohl had called „healing” was nothing else but an illusion, something that *Der Spiegel* confirmed and a few years later the British press (*The Economist*, 1993), showed that the disease was contagious including state by state, labor market, financial market and monetary ones together in this morbid process. (Mussolf, 2004)

The Romanian media also uses the method mentioned above. Here are some examples in Romanian journal's titles:

1. Taken from the European press, translated in Romanian - *Deutsche Welle*: "Schengen topic - symptoms of ill Europe"<sup>6</sup>;
2. *Romania Libera* – „China: America is sicker than Europe”<sup>7</sup>;
3. *Ziarul Financiar* - „Europe is out of intensive care, but still sick”<sup>8</sup>;

<sup>6</sup> „Subiectul Schengen - simptom de Europă bolnavă” – *DW* din 14 octombrie 2011, online on <http://www.dw.de/subiectul-schengen-simptom-de-europa%C4%83-bolnav%C4%83/a-15460804>

<sup>7</sup> „China: America e mai bolnavă ca Europa” - *Romania Libera* din 8 decembrie 2010 online on <http://www.romanialibera.ro/economie/finante-banci/china--america-e-mai-bolnava-ca-europa-209031>

4. *Ziarul Financiar* - „World leaders are concerned about the economic health of Europe”<sup>9</sup>;

5. *Capital* – „Sick Romania annual loses 2.5 billion Euro”<sup>10</sup>.

The above examples illustrate the idea that there are common representations in the space we started to call the transnationalised public sphere. Conveying common representation on this space, media not only inform but also contribute in creating a specific public structures adapted to the "communicative reason" as Habermas used to call. Of course all this effort is banned by constrains and limitations, affecting journalistic performance and superposing to the Europe's supposed communication deficit. As researchers have concluded it seems easy but also simplistic to lay responsibility upon this phenomenon entirely on journalists, even they are affected more or less by editorial policy, by media organisations, political parties influences etc.

They acknowledge, however, that EU issues are not easily to approach. It is not easy to write news about the European values and standards. However, despite the constraints, sometimes coming from exactly the journalistic organizations, journalists do not hesitate to write reviews and comments about the EU, especially since the readers are not as competent and well informed as they probably are on domestic policy issues and, on the other hand, the political groups are not so clearly defined as the national ones are. One of the aims and goals of the journalists is to raise awareness and to open up debates over Europe (Statham, 2010: 149). The formative role of the press is here, from this point of view, very strongly.

So we can emphasise that the media is one of the most relevant actor concurring to Europeanization of national public spheres, making its own contribution to the public debate on European issues: „the press contributes as political actor to the Europeanization of national public spheres”. (Phetsch, Adam and Eschner, 2010: 151). By writing opinion articles and commentary, journalists want not only to express their identity through a certain political stance towards EU policies and measures, in their autonomous actors quality, a role played on the stage of the public debate, but also to exert a certain influence as opinion leaders recognized together with politicians, with activists etc., which was registred in

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<sup>8</sup> „Europa a ieșit de la terapie intensivă, dar e încă bolnavă” *Ziarul Financiar* - 6 martie 2012 – online on <http://www.zf.ro/business-international/europa-a-iesit-de-la-terapie-intensiva-dar-e-inca-bolnava-9372976>

<sup>9</sup> „Liderii lumii sunt îngrijorați de sănătatea economică a Europei” - *Ziarul Financiar* - 13 octombrie 2014 – online on <http://www.zf.ro/business-international/liderii-lumii-sunt-ingrijorati-de-sanatatea-economica-a-europei-13378328>

<sup>10</sup> “România bolnavă pierde anual 2,5 miliarde de euro” – *Capital* – 3 mai 2013, online on <http://www.capital.ro/romania-bolnava-pierde-anual-25-miliarde-de-euro-181437.html>

critics about the quality media by researchers as Benjamin Page, Robert Shapiro and Glenn Dempsey<sup>11</sup>.

EU topic press stimulate awareness and development of European identity, so the national media are important actors on integration and Europeanization. Providing editorial space and including on agenda topics about EU integration media help the proces of creating and strengthening transnational communication flows, on condition that in all countries the themes should to be treated in a similar semiotic aspect, meaning a common sense system with referential base and common understanding of facts: „Regarding the congruence of European debates, the question is not only whether media mention common issues, but also whether they discuss them with respect to similar political interpretations” (Phetsch, Adam and Eschner, 2010: 153).

Romanian media has developed, as well, a number of strategies in order to participate in European communication flow. We have to mention, though, that neighter Romanian journalists nor the public easily manage difficulties in presentation and comprehension of European issues. A research in progress tries to determine discursive strategies of adaptation to European communication flows and difficulties faced by actors playing in Romanian national public sphere. We also want to determine a model of media involvement in the formation of European public simultaneously with its own training as a communicator and European player of the European public sphere.

We appreciate the positive attempt to introduce European issues in the public debate and to realise a public education in order to obtain enough audience for these themes, but including these formative strategies in journalistic discourse obviously require longer practice, exercise and improvements.

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<sup>11</sup> Benjamin Page, Robert Shapiro and Glenn Dempsey conducted a study on the influence that various intervening from the televisual media space, journalists, politicians, experts, etc. have on public opinion, how and to what extent these changes affect opinions on various topics under discussion. The research results were published in an article entitled "What Moves Public Opinion" in the American journal *The American Political Science Review*, vol.81, no.1 (March 1987), pp.23-44.

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## Perspectives on Identity and Acculturation of Immigrants in Europe

*Simona FER*

**Abstract.** *Migration has always played a requisite role in the history of mankind. At present the intensity and frequency of cross-border mobility are much higher than in previous decades. In addition, many citizens are children of foreigners and belong to the so called second generation of immigrants, these people belonging to two different cultures. The second generation of immigrants is raised and educated in accordance with the value system of their parents' country of origin. Outside the home, they familiarize themselves with the national society's value system, while the kind of neighbourhood in which they live may be more or less encouraging. Cultural assimilation occurs when immigrants voluntarily adopt their new country's language and cultural practices to integrate into society and improve their chances of economic and social gain.*

*Sociologists suggest that differences in cultural integration efforts matter less to the formation of acculturation preferences of the second generation. Somewhat surprisingly, the position of this growing segment of European societies is still underexplored, reasons for policy-makers concern. In this paper we are trying to reflect both the attitude of immigrants and that of European host countries towards integration and assimilation of new habits and cultures.*

**Keywords:** *acculturation, cultural appropriation, intercultural communication, language assimilation*

The concepts of cultural diversity and cultural identity are at the forefront of political debate in many western societies. In Europe, the discussion is stimulated by the political pressures associated with immigration flows which are increasing in many European countries. Ethnic and cultural heterogeneity associated to such trends is one of the most important challenges that European societies will face. Sociologists have been studying the cultural integration patterns of immigrants at least since the late nineteenth century. Economists, have instead been traditionally interested in assessing the direct impact of immigration flows on market outcomes, mainly on the labour market, or on fiscal transfers and public goods provision.

Immigrants are motivated to leave their countries for a variety of reasons, including a desire for economic prosperity, political issues, family re-unification,

escaping conflict or natural disaster, or simply the wish to change one's surroundings. More generally, social scientists have dedicated a lot of attention to the fact that immigrants' integration can significantly alter the design and the political economy of public policies in the host society. Cultural diversity may indeed affect the sense of community and social solidarity which constitute founding pillars of democratic welfare state systems.

For these reasons several observers favour explicit public policies promoting or even requesting the cultural assimilation of immigrants to the cultural attitudes of natives. Other observers argue that welfare state institutions should be designed to accommodate cultural diversity. These policies would facilitate contacts across communities, promote tolerance, trust and respect towards other groups and, in the end would help develop new national identities<sup>1</sup>.

Many European countries are characterized by aging and shrinking populations. In order to ensure their economic growths and maintain their welfare systems, they have implemented a series of measures to reduce the demographic effects, among which opening channels to legal migration, playing a key role. As these countries try to attract the same group of people, mainly highly skilled professionals and low-skilled workers, increasing competition between the two regions might be observed in the upcoming years. In particular, high-skilled professionals are targeted by receiving societies. They are encouraged to stay for longer periods or even enticed to settle down permanently.

This is achieved by providing them with rights and benefits, facilitating their stay, and making them the target of integration policies<sup>2</sup>. This is a consequence of diverse pull and push factors, combined with technological advancement, and is true for Europe. his large-scale movement, however, changes the composition of the societies in the sending and receiving countries and results in some of today's key challenges.

*Identity* is defined as a person's self image based on social categories and on prescriptions associated with these categories. Scholars from many different academic disciplines have generally categorized ethnic identity formation along two main theoretical frameworks: *primordial* versus *situational*. The primordial, also known as "essentialist" perspective argues that people have an innate sense of ethnic identity. It is something that people are born with, is instinctive and natural,

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<sup>1</sup> Yann Algan, Alberto Bisin, Allan Manning, Thierry Verdier, (2012) *Cultural Integration of Immigrants in Europe*, Studies of political reform, Oxford University Press, Oxford: 5-6

<sup>2</sup> Dr. Wilhelm Hofmeister et.al., (2014) *Migration and Integration. Common Challenges and Responses from Europe and Asia*, National Library Board, Singapore: 7



and is difficult if not impossible to change. On the other hand, the situational perspective, also known as the “constructionist” or “instrumentalist” states that ethnic identities are socially defined phenomena. That is, the meaning and boundaries of ethnic identity are constantly being renegotiated, revised, and redefined, depending on specific situations and set of circumstances that each individual or ethnic group encounters<sup>3</sup>.

Each person has a perception of his own categories and that of all other people. In this context there occur differences between individuals characterized by oppositional cultures when minorities adopt cultural categorizations and prescriptions defined in opposition to the categorizations and prescriptions of the dominant majority. Thus at the heart of oppositional cultures lie two crucial factors: social exclusion and lack of economic opportunities. Social exclusion derives from the well established sociological fact that dominant groups define themselves by differentiation and exclusion of others. These, in turn, create a conflict for minority members: how to work within the dominant culture without betraying his own.

From the perspective of the dominant identity, the oppositional identity is perceived as inducing bad economic decisions, self-destructive behaviour, such as taking drugs, joining a gang or becoming pregnant at a young age, which in turn can generate negative pecuniary externalities on the rest of the community. Finally, social exclusion by the majority is modeled as a loss in identity that individuals from the minority will suffer if they choose to adopt the dominant culture<sup>4</sup>.

*Cultural integration* has an essential dynamic character across time and generations. Individual members of a small minority group may decide assimilate with the dominant majority culture or not, remaining as members of the minority group.

*Acculturation* explains the process of cultural change and psychological change that results following meeting between cultures<sup>5</sup>. The effects of acculturation can be seen at multiple levels in both interacting cultures. At the group level, acculturation often results in changes to culture, customs, and social institutions. Noticeable group level effects of acculturation often include changes in food, clothing, and language. At the individual level, differences in the way individuals acculturate have been shown to be associated not just with changes in daily behavior, but with numerous measures of psychological and physical well-

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<sup>3</sup> C.N. Le, (2014) *Assimilation & Ethnic Identity - Asian-Nation: The Landscape of Asian America.*, <http://www.asian-nation.org/assimilation.shtml>, october 24: 2014

<sup>4</sup> *Ibidem*:10-11

<sup>5</sup> Sam, David L., Berry, John W., (2010) *Acculturation When Individuals and Groups of Different Cultural Backgrounds Meet. Perspectives on Psychological Science*, 5: 472.

being. As enculturation is used to describe the process of first-culture learning, acculturation can be thought of as second-culture learning.

The concept of acculturation has been studied scientifically since 1918. As it has been approached at different times from the fields of psychology, anthropology, and sociology, numerous theories and definitions have emerged to describe elements of the acculturative process<sup>6</sup>.

Although numerous models of acculturation exist, the most complete models take into consideration the changes occurring at the group and individual levels of both interacting groups<sup>7</sup>. To understand acculturation at the group level, one must first look at the nature of both cultures before coming into contact with one another.

Gudykunst, in his work *Communicating with Strangers: An Approach to Intercultural Communication* defined intercultural adaptation as an “upward-forward” progress of acculturation that brings about change in strangers in the direction of assimilation, the highest degree of adaptation theoretically conceivable. It is the process by which strangers are socialized into a new culture so as to attain an increasing functional and complete adaptation as a lifetime goal<sup>8</sup>.

This intercultural communication text provides a comprehensive overview of important theory and research in intercultural communication. *Communicating with Strangers* looks at the basic processes of intercultural communication and ties those processes to the practical task of creating understanding between people of different cultures, backgrounds and communication patterns.

Cultural appropriation is the adoption of some specific elements of one culture by a different cultural group. It can include the introduction of forms of dress or personal adornment, music and art, religion, language, or behavior<sup>9</sup>. These elements are typically imported into the existing culture, and may have wildly different meanings or lack the subtleties of their original cultural context. Because of this, cultural appropriation is sometimes viewed negatively, and has been called “cultural theft”.

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<sup>6</sup> Rudmin, Floyd W., (2003) *Critical history of the acculturation psychology of assimilation, separation, integration, and marginalization*. "Review of General Psychology 7: 3.

<sup>7</sup> Berry, J.W., (2003) *Conceptual approaches to acculturation*. American Psychological Association, 17–37

<sup>8</sup> Gudykunst, William B., Kim, Young Yun, (2003) *Communicating with Strangers: An Approach to Intercultural Communication* (4th ed.), New York: McGraw-Hill Education: 360

<sup>9</sup> Schneider, Arnd, (2003) *On 'appropriation': A critical reappraisal of the concept and its application in global art practices*, Social Anthropology 11:215–216



In some instances, acculturation results in the adoption of another country's language, which is then modified over time to become a new, distinct, language. Language shift, sometimes referred to as language transfer or language replacement or assimilation, is the process whereby a speech community of a language shifts to speaking another language. Often, languages perceived to be “higher status” stabilize or spread at the expense of other languages perceived by their own speakers to be “lower-status”. Many interesting analyses of cultural transmission require this assumption to be relaxed.

Indeed, in many situations the adoption of a dominant cultural trait might provide a beneficial effect per se. Adoption of the dominant language has beneficial effects on the labour market. In this case, altruistic parents may favour the cultural assimilation of their children. This trade-off between cultural preferences and the disadvantage of minority traits in terms of labour market integration may be central to the integration pattern of immigrants in the host country.

Some changes are forced by new lifestyle demands, others are a result of attraction to alternative options in the immigrants' new home and, therefore, are more voluntary. Acculturation drives changes in many aspects of immigrants' consumer behavior. It influences adaptation in diet and food consumption customs.

Food habits and food consumption are affected by acculturation on different levels. Research indicate that food habits are discrete and practiced privately and change occurs slowly. Consumption of new food items is affected by the availability of native ingredients, convenience and cost, therefore an immediate change is likely to occur.

Acculturation is a two-way street, however, as immigrants share their own foods and customs with the larger society. Marketers may also cultivate opportunities in adding flavors brought by immigrants, to their products.

There are also ethnic and racial group variations in sexual behavior, marriage issues, differences in environment, associated norms, cultural norms, cultural values and opportunity structures. Many commentators have raised the issue that immigrants from certain cultures who move into Western countries may not be able to understand and assimilate certain Western concepts, that are relatively alien in some parts of the world, especially related to women's rights, domestic violence, LGBT rights (lesbian, *gay*, bisexual, and transgender rights) and the supremacy of secular laws in front of religious practices. For instance, in some parts of the world it is legal and socially accepted for men to use physical violence

against their wives if they “misbehave”, and wives are expected, both legally and socially, to “obey” their husbands<sup>10</sup>.

Various behaviors of women, such as refusing arranged marriages or having premarital sex, are seen in many parts of the world as justifying violence from family members (parents). A survey conducted by the Pew Research Center (an American research institute that provides information on social issues, public opinion and demographic trends) found that stoning as a punishment for adultery was supported by 82% of respondents in Egypt and Pakistan, 70% in Jordan, 56% Nigeria, 42% in Indonesia; the death penalty for people who leave the Muslim religion was supported by 86% of respondents in Jordan, 84% in Egypt and 76% in Pakistan; gender segregation in the workplace was supported by 85% of respondents in Pakistan, 54% in Egypt, 50% in Jordan.

*Cultural assimilation* occurs when immigrants voluntarily adopt their new country's language and cultural practices to integrate into society and improve their chances of economic and social gain. Social acceptance is often easier for groups whose culture and appearance more closely resemble those of the majority group. The term is used to refer to both individuals and groups and in the latter case it can refer to either immigrant diasporas or native residents that come to be culturally dominated by another society.

In the 1920s, sociologist Robert Park was the first to describe cultural assimilation as a unidirectional process of adaptation whereby immigrants endorsed the values, behaviors and ideals of the host culture, and simultaneously lost the values, behaviors and ideals characterized by the immigrant's culture of origin. At that time, cultural assimilation and notions of “one people, one culture...one nation” were the prevailing view in society, when immigrants were expected to adapt, assimilate and eventually resemble members of the host culture.

Assimilation may involve either a quick or gradual change depending on circumstances of the group. Full assimilation occurs when new members of a society become indistinguishable from members of the other group. Whether or not it is desirable for an immigrant group to assimilate is often disputed by both members of the group and those of the dominant society.

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<sup>10</sup> In 2010, the United Arab Emirates's Supreme Court ruled that a man has the right to physically discipline his wife and children as long as he does not leave physical marks. In Iraq husbands have a legal right to “punish” their wives. The criminal code states at Paragraph 41 that there is no crime if an act is committed while exercising a legal right. Examples of legal rights include: “The punishment of a wife by her husband, the disciplining by parents and teachers of children under their authority within certain limits prescribed by law or by custom”.



Cultural assimilation can happen either spontaneously or forcibly. A culture can spontaneously adopt a different culture or older and richer cultures forcibly integrate other weak cultures. The term assimilation is often used with regard to immigrants and various ethnic groups who have settled in a new land. A new culture and new attitudes toward the origin culture are obtained through contact and communication. Cultural changing is not simply a one-way process. Assimilation assumes that relatively tenuous culture gets to be united to one unified culture. This process happens through contact and accommodation between each culture. The current definition of assimilation is usually used to refer to immigrants, but in multiculturalism, cultural assimilation can happen all over the world, not just be limited to specific areas. For example, a shared language gives people the chance to study and work internationally, not just being limited to the same cultural group. People from different countries contribute to diversity and form the “global culture” which means the culture combined by the elements from different countries. This "global culture" can be seen as a part of assimilation that causes cultures from different areas to affect each other.

A state or an ethnicity can spontaneously adopt a different culture due to its political relevance, or to its perceived superiority. The first is the case of the Latin language and culture, that were gradually adopted by most of the subjugated people.

The second is not the case of subjugated, but of the older and richer culture, which see itself imitated by the new masters, e.g. the victorious Roman Republic adopted more from the Hellenistic cultures than it imposed in most domains, except such Roman specialties as law and the military.

While European countries are witnessing an especially vivid debate about immigrants' assimilation and integration into receiving societies, authors publishing papers at IZA, an Institute for Study and Labour, offer a systematic analysis of whether such assimilation is indeed taking place. They suggest that, being a complex phenomenon, assimilation may be taking place along different dimensions and with different speed, and also differ across immigrants of various origins going to various destination countries.

They find that *first-generation immigrants* differ in a most important way from native-born along such dimensions as language, citizenship, civic involvement, religiosity, trust, perceived discrimination, occupations, and income. However, these differences are no longer the same for *second-generation immigrants*. In fact, a spectacular progress is observed between generations with respect to language and citizenship, occupations and income, while features such as religiosity are relatively persistent. In contrast, perceived discrimination and

unemployment may actually aggravate for second-generation immigrants, while trust may also diminish, as compared to native-born and to first-generation immigrants.

At the same time, the researchers providing studies for the German center for migration also find that there is an important heterogeneity in these outcomes not only across immigrant generations, but also across destination countries and migrant origins<sup>11</sup>.

Assimilation along cultural and economic outcomes may be related one to another. For example, one would expect that learning a language of the receiving country may help immigrants to find a better job. They explore the relationship between assimilation along different behaviors, but do not find very strong or consistent patterns between them. In fact, for first-generation immigrants, they rather observe that progress on some dimensions may compensate the lack of progress on other dimensions; and also that a big discrepancy in one dimension is not necessarily a handicap, or an impediment, for assimilation on other grounds.

Preserving some of the behaviors may actually be of help to immigrants to progress on others. For second-generation immigrants, they find a particularly strong relationship between possessing citizenship and economic outcomes, language and citizenship, language and perceived discrimination, as well as between perceived discrimination and trust.

Since the perceived discrimination reflects immigrants' experiences with the attitudes and behaviors of native-born in the receiving societies, the latter finding suggests that immigrant assimilation is interdependent with the attitudes and acceptance of immigrants on the part of the native-born.

The gaps in language spoken at home are significant and initially large for all types of non-native-born individuals regardless of their origin. In a notable way, for this outcome, the gaps between any immigrant group and native-born never vanish, but at the same time, there is noticed impressive closing of these gaps, the nearer we get to the “native-born with both native-born parents” status. First generation immigrants with less than 20 years of residence have a 53.5 percentage points higher probability of speaking a different language at home. This gap is still statistically significant for second-generation, but the magnitude drops dramatically to 12 percentage points.

In all destination countries, second-generation immigrants have lower gaps in speaking the language of the country than the first-generation immigrants. The

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<sup>11</sup>Mariya Aleksynska, Yann Algan, (2010) *Assimilation and Integration of Immigrants in Europe*, IZA Discussion Paper No. 5185, Bonn, September: 4



gap in the probability of speaking a different language at home ranges from 22 percentage points in France, 42 percentage points in Germany, to 80 percentage points in Austria. They thus seem to capture genuine specificities in the integration process of each destination country.

Turning to religiosity, considered to be perhaps the most persisting cultural trait, we find out that researchers measured religiosity as the frequency of praying, relating it to answers to the question: “Apart when you are at religious services, how often if at all do you pray”. The answer takes on values 1 for every day, 2 for more than once a week, 3 for once a week, 4 for at least once a month, 5 for only on special holidays, 6 for less often, and 7 for never; and they converted them into days per year. The outcomes show a much higher frequency of praying among first generation immigrants relative to natives.

The religiosity of the new country does not influence immigrants’ religion ethnic patterns or homeland attachment. Insofar as group size is a significant determinant of particularistic behaviors, it weakens them. The more policy-based opportunities newcomers receive, the more they dissociate from group behaviors and homeland ties<sup>12</sup>.

Other surveys show that the frequency of praying is significantly higher among immigrants from MENA (Middle East and North Africa) and Africa, and to a lesser extent from Asia and South America, relative to native-born. Besides, the gap persists and remains as high among second generation immigrants as among first-generation immigrants, although heterogeneity of changes along this dimension is observed across destinations<sup>13</sup>.

Integrating immigrants, allowing them to participate in the host society at the same level as natives, is an active, not a passive, process that involves two parties, the host society and the immigrants, working together to build a cohesive society.

Most studies of the relation between naturalization and integration, have focused on policies and structural context of destination countries, particularly in Europe, but there is relatively little attention for the role of origin countries in the process of naturalization and integration of immigrants. Yet it is evident that the ‘origin factor’ matters significantly when assessing the question of immigrant integration. Especially, dual citizenship policies in origin countries should be taken into account as a potential facilitating or restraining factor for the process of integration of immigrants.

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<sup>12</sup> Uzi Rebhun, (2014) Immigrant Acculturation and Transnationalism: Israelis in the United States and Europe Compared, in *Journal for the Scientific Study of Religion*, vol. 53, issue 3: 314

<sup>13</sup> *Ibidem*: 13

These dual citizenship policies may be reflected in general rules in constitutions or citizenship laws on the loss of citizenship upon voluntary acquisition of another citizenship, but also in more specific bilateral agreements between countries or rules that only apply to citizens from certain countries<sup>14</sup>.

Immigrants belong to two places: first, where they come and second, where they now live. While integration takes place in the latter, immigrants maintain a variety of links with the former. New means of communication facilitating contact between immigrants and their homes, globalization bringing greater cultural diversity to host countries, and nation-building in source countries seeing expatriate nationals as a strategic resource have all transformed the way immigrants interact with their home country. A considerable amount of high-quality research on the integration of immigrants has been produced in the EU. Building on existing research to investigate the impact of origin countries on the integration of immigrants in the host country remains to be done<sup>15</sup>.

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<sup>14</sup> *Ibidem*: 10

<sup>15</sup> Maarten Peter Vink, (2013) *Immigrant Integration and Access to Citizenship in the European Union: The Role of Origin Countries*, INTERACT Research Report 2013/05, San Domenico di Fiesole (FI): European University Institute: 4



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## **BOOK REVIEWS**



**Susan Eva Eckstein and Adil Najam (editors), *How Immigrants Impact their Homelands*, Durham and London: Duke University Press, 2013, 261 pages, ISBN 978-0-8223-5395-9**

*Review by Cristina Matiuta*

Immigration is one of the most important components of the globalization process, affecting tens of millions people worldwide. Many studies deals with this complex phenomenon, especially in terms of immigrants' adaptation in the receiving countries or in terms of their transnational ties with families and communities left behind.

The book reviewed here, *How Immigrants Impact their Homelands*, edited by Susan Eva Eckstein and Adil Najam, proposes a comprehensive approach of the economic, social, political and cultural impacts that immigrants from developing countries have on their homelands. According to statistics, three quarters of today's immigrants are born in developing countries and they are moving to high-income countries, becoming agents of homeland development. Countries as Mexico, China, India, Turkey, considered in this book, are among the countries providing the largest number of people who emigrate.

The book includes as case studies China, India, Cuba, Mexico, Turkey, Marocco, Philippines, Mozambique, preceded by two theoretical chapters. Thus, in the first chapter, Susan Eckstein provides an overview for a better understanding of the case studies detailed in the following chapters. We find out here which are the characteristics of emigrants, where do they go and how to explain the patterning of immigration. Immigration must be understood in the context of historical and institutional processes. State policies, changing demographics, transnational social dynamics- all influence from and to where people in today's world move. In the next chapter, Alejandro Portes examines the conditions under which migrants become agents of homeland development. In the author's view, international migration could be transformed into a win-win process, if sending and receiving governments would take active steps in organizing it as a managed labor-transfer program guided by the long term development potential of migration rather than its short-term economic consequences.

The remaining chapters focus on country studies, highlighting the economic impacts or social consequences that immigrants have had. Thus, in the third chapter, Min Ye shows that Chinese emigrants became instrumental in the industrial transformation of their country since the late 1970s, being the largest investors in their homeland and influencing the government's reform policies. This idea of immigrants contribution to the economic development of their homeland is also supported by Kyle Eischen in his chapter about the Indian case. Indian immigrants have contributed to India development establishing an important niche as an exporter of information-technology-based software services that build in their skills, networks and capital acquired in the United States. The Indian government facilitated the founding of investment zones related to software activity as the Chinese facilitated the industrial manufacturing investments. As a result, the two countries have established somewhat complementary niches within the global economy.

In the fifth chapter, Susan Eckstein describes how the Cubans emigrated in the United States contributed to a transformation of the Cuban economy, values and norms, to a transformation of Cuban society, firstly as a consequence of their commitment to a family they left behind. Both recipients of remittances and government benefited from the generosity of diaspora, which produced the changes in life style, values, norms and the increase of consumers' expense.

In Mexico, as David Scott Fitzgerald emphasizes in his chapter about the immigrant impacts, the concept of *dissimilation* (understood as the process of becoming different), describes the changes involved by this phenomenon. As Mexican immigrants and their children become similar to other Americans (98% of all Mexican emigrants are in the United States), they become dissimilar from the nonmigrant Mexicans they left behind. Drawing on research in six migrant-origin communities in four Mexican states, the chapter underlines how migrants change even when they maintain homeland ties and even when they assimilate in their new land.

In the next chapter, Riva Kastoryano analyzes how Turks living abroad redefine Turkish nationalism. They difuse new ideas, introduce new discourses, initiate new forms of actions and transmit their knowledge of democratic politics acquired in Europe. Thus, they are playing an important role in questioning official Turkish nationalism, considered natural until recently, but now defensive in the face of claims of cultural and Islamic rights with a legal basis in European countries and institutions.

The last three book chapters highlight the social consequences that immigrants have in Philippines, Central America and Mozambique. Migration generates the second largest amount of foreign currency in the Philippines (next to



electronics manufacturing), making women into breadwinners, not only in their families, but also for the nation. Due to the demand for domestic workers in the richer countries throughout the world, the migration of Filipino women breaks the traditional gender division of labor in the family. In Central American countries (El Salvador, Guatemala, Honduras), migrants who returned from the United States brought the gangs with them, contributing to a surge in crime and public insecurity. It is a challenge for local authorities and extant institutions to deal with the identities migration creates, to fight against violence and youth social exclusion. In Mozambique, men's labor migration to neighboring South Africa generates fears about the HIV/AIDS risks among their nonmigrant wives. The women's gains in material well-being come thus with costs of uncertainty and concerns about contacting infection from their partners, showing us the multidimensional consequences migration may have on the families, communities and countries involved.

Consequently, as appears from this brief description of its content, the book represents undoubtedly a valuable contribution for those interested in the multiple facets of migration, broadening the understanding on the complex consequences of this phenomenon. Benefiting from the wisdom of scholars who are leading experts of emigration from developing countries, the volume provide a foundation for policy reforms that could strengthen the positive effects and minimize the negative effects of the today's mobile world.

## **UPCOMING EVENTS**

**INTERNATIONAL CONFERENCE**  
**with the support of the European Commission, Jean Monnet Programme  
of the European Union**

***Active Citizenship, Identity and Democratic Governance  
in the European Union***

Oradea, Romania  
21-22 May 2015

**Call for papers**

**Background:**

"We are not bringing together states, we are uniting people"- said Jean Monnet in 1952. After more than sixty years since his assertion, raising the feeling of common European identity and involving citizens in the EU public affairs are still great challenges for the European integration process.

The conference aims to address these challenges, exploring the topics of identity and participation in the European Union from a multidisciplinary perspective, offering the possibility of interaction between academics, researchers and other professionals.

From our point of view, the active citizenship is a key element for strengthening the cohesion and the development of democracy, for fighting against intolerance, racism and xenophobia and, at the same time, is a tool for enhancing European identity and promoting the identification of European citizens with European Union institutions. A well-functioning democracy is as a two-way street. It draws on the input of individuals, groups and organisations and in turn it encourages and empowers people to become more engaged when they realise that they can make a difference. Active citizenship is more than casting a vote every few years. It strengthens the citizens' trust to institutions and contributes to social and economic development.

At the same time, the formation of a European demos with a collective identity is one of the preconditions to improve the democratic legitimacy issues of the European Union. In the context of subsequent EU enlargement waves and

increased cultural diversity, one might ask whether there is sufficient commonality in the Europeans' perceptions regarding the EU project to substantiate a collective identity.

The conference tries to offer a new perspective in approaching the European integration process, to contribute to a deep understanding of the European integration phenomenon, through presenting and evaluating the prospect of building European identity and the potential for increasing participation in the EU democratic process.

### **Conference topics**

- The peculiarities of the European integration process:
- Identity layers in Europe and the meanings of European identity
- Social Capital and Civic Engagement in the European Union
- Political participation and representation in the European Union

### **Keynote speaker and conference format:**

The first part of the conference will take place in plenary format. The keynote speaker will be **Mr. Emil Hurezeanu**- writer and journalist.

Sixteen papers will be chosen on the basis of abstracts submitted (four for each topic) and four invited papers.

The organizers will approach a publisher after the notification of paper acceptance, and intend to publish an edited book of selected papers within 12 months of the date of the conference.

### **Important dates:**

- 15 March 2015: Deadline for submission of abstract
- 31 March 2015: Notification of acceptance
- 15 May 2015: Delivery of full conference paper
- 21-22 May 2015: Conference

### **Abstracts:**

The abstracts (max. 500 words, followed by 3-5 keywords) will be submitted for review in electronic MS Word format. Please provide the full names, affiliations and e-mail addresses of all authors. Abstracts should be sent by 15 March 2015 to the following address:



Cristina Matiuta, Department of Political Science and Communication Sciences, University of Oradea; e-mails: [cmatiuta@uoradea.ro](mailto:cmatiuta@uoradea.ro); [cristinamatiuta@yahoo.com](mailto:cristinamatiuta@yahoo.com)

### **Organizers**

The conference is organized by the University of Oradea, Faculty of History, International Relations, Political Sciences and Communication Sciences and the Research Centre on Identity and Migration Issues ([www.e-migration.ro](http://www.e-migration.ro)), as an activity within the Module Jean Monnet “*Active Citizenship, Identity and Democratic Governance in the European Union*”.

### **Travel & Accommodation**

There is no participation fee for the conference. Accommodation and meals during the conference will be paid by the organizers for one presenter of each accepted paper. There are no available funds for travel costs.



## NOTES ON CONTRIBUTORS

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